

GTME TE DAP WalkMe Playbook

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Introduction

Within this playbook, you will find resources to help you design and develop performance support learning experiences using WalkMe as the primary tool. This playbook is divided by the phases of the [GEEK information Asset Lifecycle Standards: Create, Review, Publish, Update, Pending Archive, Archive, Delete](#). It is our goal that this playbook offers definitions and best practices for WalkMe learning solutions.

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Governing Framework

General Definitions

- **Digital Adoption Platform (DAP):** Software that integrates and/or overlays within digital tools to guide, train, and support users.
- **Workflow Learning:** Learning integrated into the natural workflow, enabling users to learn at the moment of need without leaving their work environment.
- **Performance Support:** Tools and resources provided to enhance the ability of employees to perform tasks effectively with minimal external assistance.

Guiding Principles

- **Instructive:** Provide clear, concise, and easy-to-understand guidance that caters to users from beginners to experts.
- **Non-intrusive:** Ensure learning tools do not disrupt workflow and are accessible without impeding the user's primary tasks.
- **Focused and Timely:** Deliver content that is directly relevant to the user's current activities and provide it precisely when it is most needed.
- **Accessible:** Design for all users, considering diverse needs including visual, auditory, motor, and cognitive disabilities.

Standard Operating Procedures (SOPs)

WalkMe Roles

Overview

The main roles assigned in WalkMe's Admin Center – subroles are identified here to show what the main role capabilities are.

- **Admin:** Complete control over the account, including settings and user management. This includes subroles:
 - **System Manager:** Modify systems and associated users, but only if assigned to the user in the Admin Center.
 - **Content Manager:** Create and Modify WalkMe content and settings, can publish to all environments.
 - **Analyst:** Limited to viewing content and settings. Complete access to Insights content and settings.
- **Content Manager:** Create and Modify DAP content and settings, can publish to all environments. This includes subroles:
 - **Publisher:** View WalkMe content and settings, can publish to all environments.
 - **Builder:** Create and Modify WalkMe content and settings. Unable to publish to any environment.



- Content Viewer: View WalkMe content and settings. Complete access to Insights content and settings.
- Content Creator: Create and modify WalkMe content and settings, cannot publish to any environment.
- Analyst: Limited to viewing content and settings. Complete access to Insights content and settings.
- **Content Creator:** Create and modify DAP content and settings, cannot publish to any environment. This includes subroles:
 - Analyst: Limited to viewing content and settings. Complete access to Insights content and settings.

Roles & Responsibilities

WalkMe Roles	DAT Roles	Solution Development Phase Responsibilities
Admin	<ul style="list-style-type: none"> DAT Program Manager DAT Senior Learning Consultant 	<ul style="list-style-type: none"> Create: Ensure URL manifest is up-to-date Review: Provide review and feedback to LC based on standards and Publish: N/A Update: Assist LC in Renew/Archive decision Pending Archive: Assist LC in Renew/Archive decision Archive: Quarterly review old assets for archiving Delete: N/A
Content Manager	<ul style="list-style-type: none"> DAT Learning Consultant 	<ul style="list-style-type: none"> Create: Use all development standards Review: Follow QA and Troubleshooting before escalating Publish: Follow Publish processes Update: Intake and partner with SLC in Renew/Archive decision Pending Archive: Intake and partner with SLC in Renew/Archive decision Archive: Review and Archive assets Delete: N/A
Content Creator	<ul style="list-style-type: none"> Partner (Change Management, PE) 	<ul style="list-style-type: none"> Create: Use all development standards Review: Follow QA and Troubleshooting before escalating Publish: Follow Publish processes, partner with DAT Update: Notify and partner with LC for review Pending Archive: Partner with LC for decision Archive: Follow Archive process or partner with LC Delete: N/A



Scenario RAPIDs

Resource: [RAPID - LDX Redux.pptx](#)

Solution Development RAPID

Typical RAPID when developing DAP solutions for a specific program or project.

Recommend	DAT Program Manager, DAT Senior Learning Consultant, DAT Learning Consultant
Agree	Change Management, SME, Stakeholder
Perform	DAT Senior Learning Consultant, DAT Learning Consultant
Inform	Change Management, SME, Stakeholder
Decide	TE Director, Senior DAT Lead

Escalation RAPID

If there is a specific issue that is difficult to resolve, either technical or strategic.

Recommend	DAT Program Manager, DAT Senior Learning Consultant, WalkMe Support
Agree	DAT Senior Learning Consultant, WalkMe Support
Perform	DAT Senior Learning Consultant, WalkMe Support
Inform	Change Management, SME, Stakeholder
Decide	DAT Senior Learning Consultant, Senior DAT Lead

Severity for DAP Escalation Examples

- **Low Severity (Level 1)**
 - Roles Involved: LC, WalkMe Support
 - Reasons for Escalation:
 - Solution performance difference between Test and Production environments
 - Solution Rules are not working properly
- **Medium Severity (Level 2)**
 - Roles Involved: SLC, LC, WalkMe Support
 - Reasons for Escalation:
 - Solution requires jQuery
 - WalkMe not working on system
 - New WalkMe user needs to be assigned
- **High Severity (Level 3)**
 - Roles Involved: PPM, SLC, LC, WalkMe Support
 - Reasons for Escalation:
 - WalkMe not working on system
 - Integration not working as expected



Solution Development Standards

Before Development – Stakeholder Consultation

Level of Effort Decision Tree: WalkMe Solution Build

Reference Level of Effort per Scenario: [GTME TE DAP WalkMe Playbook - Consultation Guide.pptx](#)

1. What is the primary goal of this initiative?

- a. **Raise awareness of new features or policies** → Go to Question 2.
- b. **Provide guidance on form completion to improve accuracy** → Go to Question 3.
- c. **Ensure smooth adoption of a new system or process** → Go to Question 4.

Question 2: Awareness Campaign

- **Does the solution need to be quick and easy to understand without in-depth interaction?**
 - **Yes → Low Effort Solution:** Use **ShoutOuts** to announce new features and policies. (e.g., WM BUILD Awareness - ShoutOut.mp4)
 - **No** → Go to Question 5.

Question 3: In-System Form Support

- **Do users only need quick tips or assistance while filling out the form?**
 - **Yes → Low Effort Solution:** Use **SmartTips** with in-form tooltips to guide users and reduce errors. (e.g., WM BUILD Hints - SmartTips.mp4)
 - **No → Medium Effort Solution:** Implement **Shuttles** and **Resources** with contextual prompts, dummy text, and help buttons for real-time assistance. (e.g., WM BUILD Hints - SmartTips.mp4)

Question 4: Adoption of a New System

- **Is there a need for in-depth support during a transition to a new system?**
 - **Yes** → Go to Question 6.
 - **No** → Go to Question 5.

Question 5: Medium Effort Solution

- **Are you supporting ongoing learning and awareness after launch?**
 - **Yes → Medium Effort Solution:** Use **SmartTips** for ongoing reminders, contextual prompts, and help buttons.
 - **No → Low Effort Solution:** Use **ShoutOuts** or **Smart WalkThrus** to deliver key information and updates.

Question 6: High Effort Solution

- **Does the transition require comprehensive onboarding or step-by-step walkthroughs?**



- **Yes → High Effort Solution:** Build a complete onboarding experience using **Smart WalkThrus**, **Launchers**, and **Shuttles** to guide users through the new system with clear instructions and ongoing in-system support. (e.g., WM BUILD Adoption Campaign - Mini Onboarding.mp4)
- **No → Medium Effort Solution:** Create in-system support with **ShoutOuts** and **SmartTips** to highlight key areas and provide support during the transition.

Pre-solution Checklist

These items are critical to make sure the in-app solution can be successfully created, tested, and published. Make sure stakeholders are able to provide this information, if not, WalkMe development cannot start.

- ☐ **Project Name**
- ☐ **Project Requestor.** Name of individual making the request.
- ☐ **Published System.** System or subsystem where in-app solution will be published.
Use Case. Which of the following use cases best describes what we are trying to solve for. ([See solution menu](#))
- ☐ **System Environment URLs.** Share Test/Production/Sandbox URLs for the environment.
- ☐ **Live Dates - Testing.** When is the feature expected to go live in the testing environment?
- ☐ **Live Dates - Production.** When is the feature expected to go live in the production environment?
 - **System Permissions.** Are there specific permissions needed in the system environment, both Testing and Production. Can you fast track access or does this require submission of an IT ticket?
*Stakeholders are responsible for handling access issues. (e.g. submit a ticket on behalf of DAT/TE to ensure correct mirroring of access)
- ☐ **Test data (account names, create/test actions, etc.)** Provide sample test data to mimic real-world usage.
- ☐ **Publication Date.** Date the solution should be published to the system.
- ☐ **Runtime.** How long should the solution be live in the environment?
Audience. Who is the audience for this solution? If multiple audiences, is the content different for each audience?
 - ***Important!** Currently, segmentation takes high-effort and can only segment based on system UI elements. Please specify how the UI is different per audience.
- ☐ **Workflow Demonstration.** Share a link to a video demo or screenshots with text showing conditions under which the in-app solution should appear.
- ☐ **Messaging Content.** Share any copy (text) or media (images, links, video) that will be part of the solution.
- ☐ **Workflow Subject Matter Expert.** Individual who understands the workflow the solution needs to target.
- ☐ **Additional Resources.** Share PRD, Figma mockup (if applicable), etc.



Development Overview

1. **Create:**

- a. Define the purpose and scope of the solution.
- b. Use resources like Figma Mockups to visualize the design.
- c. Develop content using the WalkMe editor, following standard development practices.

2. **Review:**

- a. Conduct Quality Assurance (QA) to ensure rules and URLs are correct.
- b. Gather feedback from Subject Matter Experts (SMEs) and stakeholders.
- c. Troubleshoot any issues that arise during testing.

3. **Publish:**

- a. First publish the solution in a test environment for stakeholders' review.
- b. After testing and adjustments, publish the solution in the production environment.
- c. Ensure both test and production environments are mirrored for consistency.

4. **Update:**

- a. Regularly review the solution's performance using insights and data.
- b. Determine if updates or renewals are necessary based on usage data and strategic priorities.

5. **Pending Archive:**

- a. Notify relevant parties about decisions to renew or archive solutions.
- b. Assess the effort required for updates if needed.

6. **Archive:**

- a. Archive solutions from both test and production environments.
- b. Move assets to an archive folder for future reference.

7. **Delete:**

- a. Only delete unused drafts or non-essential assets.

Consultation Guide

Here is the Building Guide deck [GTME TE DAP WalkMe Playbook - Building Guide](#)



Create

Using the Scenario Solution Menu and Assets

The standardized assets have been distributed to each system in the folder “[DAT PLAYBOOK] Assets”.



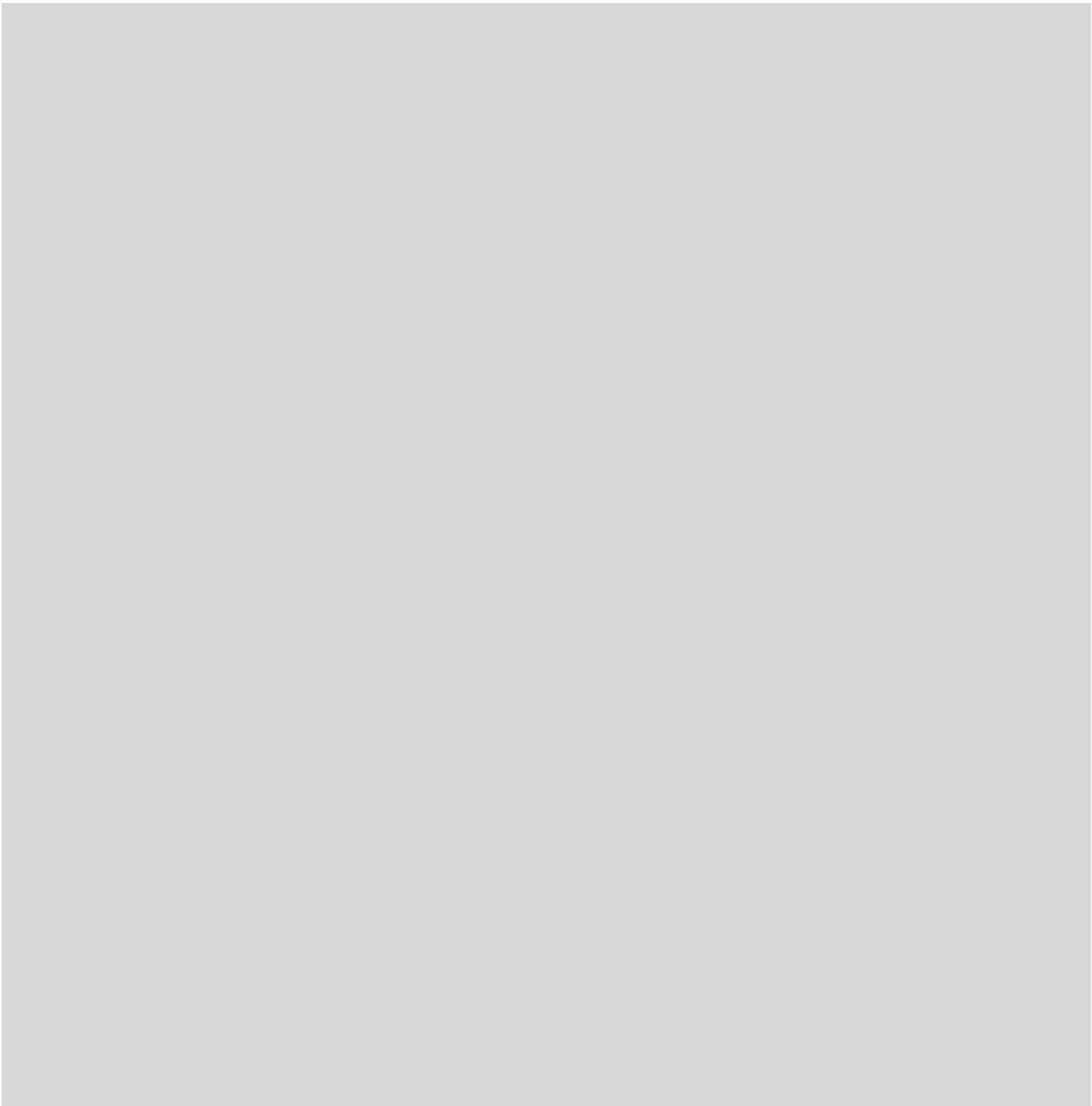
How-to:

1. Duplicate (make a copy of) the provided WalkMe asset in the WalkMe Editor
2. Move the new copy to the appropriate project folder or location in the WalkMe Editor
3. Use the [Naming Convention Tool](#) to give the new asset a title/name
4. Edit as needed (reselect element, add steps, text content, etc)

[Jump to Solution Menu below](#)

- **Solution Samples:** Check out how the following use cases manifest as a solution in system (Note: these use old templates): [DAP Use Cases and Examples.pptx](#)





- **Figma Mockup Samples:** [REDACTED]
[REDACTED]
[REDACTED]

Scenario Solution Menu

****Note: WalkMe IDs provided here are based on the origin system of Dynamics 365. The standardized assets have been distributed to each system in the folder “[DAT PLAYBOOK] Assets”.***



Big Center ShoutOut have surveys attached to collect NPS and end-user feedback – DO NOT CHANGE THESE.

System Migration (Mini-System Onboarding)

Blank Template

This is a test announcement about system issue can hold a little or a lot of text. This can also include media to the right of the text.

256 × 256

CTA Button

CTA Button

👍 👎

Helpful info?

Report a Problem 🗨️

Selected element

i

CTA Button

Mini Menu Example

Brief explanation of what is contained in this mini menu.

Subsection 1

Mini menu item 1
Mini menu item 2
Mini menu item 3

Subsection 2

Lorem ipsum

Lorem ipsum dolor sit amet

Back
Next

Objective: Need to ensure a seamless transition from one software system to another for all users in order to maintain productivity and enhance user confidence during the migration process.

Deliverables:

- Comprehensive in-system onboarding and support.
- Clear introductory messages.
- Step-by-step guidance during the migration process.
- Interactive tutorials to facilitate learning of new tools and workflows.
- Ongoing in-system support and reminders about new features and policies.

Goal: Reduce support requests, minimize downtime, and facilitate user familiarity with new tools and workflows.

“Jobs to be done” statements:

1. As a user, I need clear introductory messages when accessing the new system, so that I understand the context and changes from the previous system.
2. As a user, I need step-by-step guidance during the migration process, so that I can perform my tasks with the new toolset without confusion or errors.
3. As a user, I need interactive tutorials to quickly learn the new system workflows and tools, so that I can maintain my productivity with minimal downtime.
4. As a user, I need ongoing in-system support and reminders about new features and policies, so that I can stay up-to-date and fully utilize the new system capabilities.
5. As a learning designer, I need to ensure users are effectively onboarded and supported during the migration, so that the transition is smooth and support requests are minimized.

Duration	60-90 days	Recommended to use user segmentation. Renew only specific assets to target adoption. Duplicate solution and modify for different user groups.
WalkMe Asset*	ShoutOuts Big Center 545753 Right Corner 545756 Top Banner 547292 Walkthroughs 1824117 Resources (List) 1869038 Launchers Big 776382 Small 776374	<i>[Typical assets that make up solution.]</i> <ul style="list-style-type: none">• ShoutOuts• Smart WalkThrus• Resources• Launchers



New Features

Blank Template

This is a test announcement about system issue can hold a little or a lot of text. This can also include media to the right of the text.

256 × 256

CTA ButtonCTA Button

Helpful info?

Report a Problem

Media Placeholder

Title

This is a test announcement about system issue can hold a little more text.

CTA Button

This is a test announcement about system issue.

CTA Button

Helpful info?

Please rate how helpful this information is to you.
Rate from 0 (least helpful) to 10 (very helpful)

012345678910

Least HelpfulVery Helpful

Submit

Lorem ipsum

Lorem ipsum dolor sit amet

BackNext

Selected element

i

Objective: Need to ensure that users can quickly grasp and effectively utilize new features introduced in the system in order to accelerate user adoption and enhance workflow efficiency.

Deliverables:

- Announcements of new capabilities.
- Comprehensive walkthroughs of new features.
- Step-by-step guidance to integrate new functionalities into existing workflows.



- Interactive tutorials to facilitate understanding and usage of new features.
- Ongoing in-system support and reminders about newly launched capabilities.

Goal: Facilitate user familiarity with new features, accelerate adoption, and improve overall workflow efficiency.

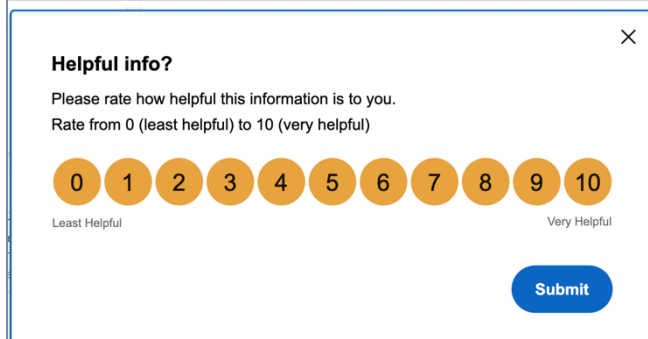
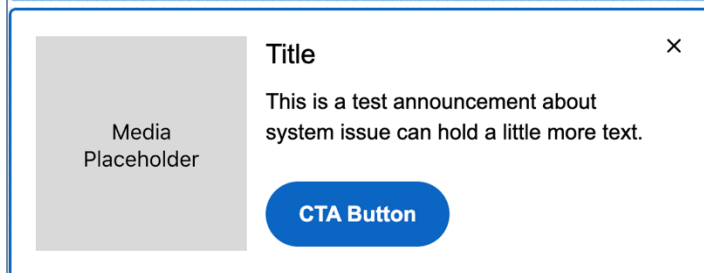
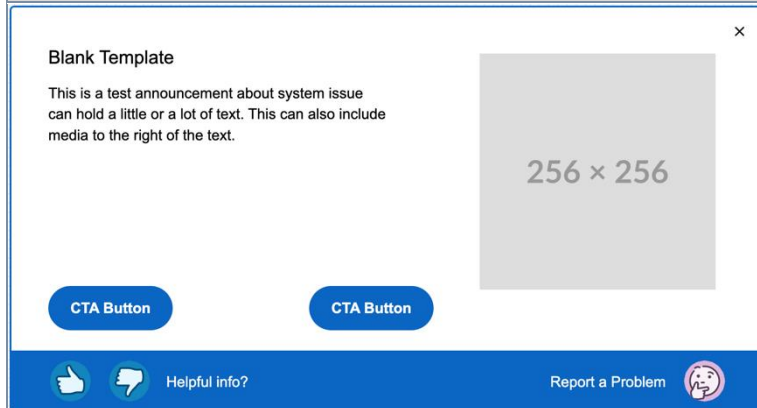
“Jobs to be done” statements:

1. As a user, I need clear announcements of new features, so that I am aware of the new capabilities available to me.
2. As a user, I need comprehensive walkthroughs of new features, so that I can quickly understand and utilize them in my workflow.
3. As a user, I need step-by-step guidance to integrate new functionalities into my existing workflows, so that I can maintain efficiency and productivity.
4. As a user, I need interactive tutorials to facilitate understanding and usage of new features, so that I can fully leverage the new capabilities.
5. As a learning designer, I need to ensure users are effectively informed and supported when new features are launched, so that user adoption is accelerated and overall efficiency is improved.

Duration	2-4 week cycles	Renew as needed based on Insights data.
WalkMe Asset*	ShoutOuts Big Center 545753 Right Corner 545756 Top Banner 547292 Walkthroughs 1824117 SmartTips 1824169 Also see SmartTip recommendations	<i>[Typical assets that make up solution.]</i> <ul style="list-style-type: none"> • ShoutOuts • Survey • Smart WalkThrus • SmartTips • Resources



In-Context Workflow Notifications



Objective: Need to guide users seamlessly through tasks within specific workflows in order to reduce errors and enhance productivity.

Deliverables:

- Real-time prompts provided within specific workflows.
- Contextual notifications triggered by user actions and system context.
- Step-by-step guidance for users performing tasks for the first time.
- Interactive instructions to support users through complex workflows.
- Ongoing in-system notifications to assist users as they navigate tasks.

Goal: Reduce errors, enhance productivity, and ensure users can complete tasks efficiently and accurately.

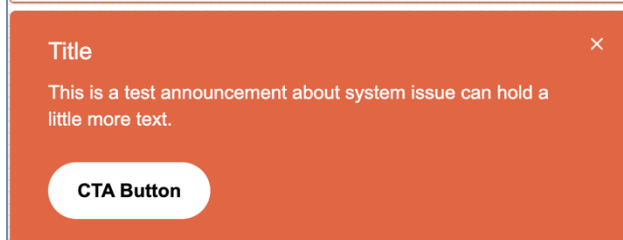
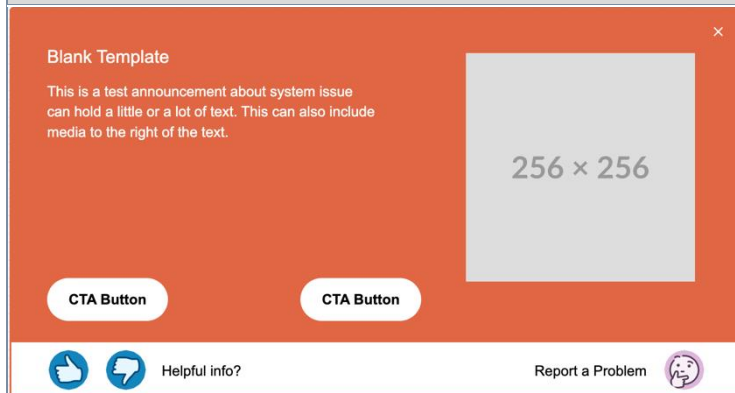
“Jobs to be done” statements:



1. As a user, I need real-time prompts within specific workflows, so that I can seamlessly complete tasks without confusion.
2. As a user, I need contextual notifications triggered by my actions and system context, so that I receive relevant guidance exactly when I need it.
3. As a user, I need step-by-step guidance when performing tasks for the first time, so that I can complete them accurately and confidently.
4. As a user, I need interactive instructions to support me through complex workflows, so that I can avoid errors and improve productivity.
5. As a learning designer, I need to ensure users receive timely and relevant in-system notifications, so that errors are reduced and productivity is enhanced.

Duration	2-4 weeks	Renew as needed based on Insights data.
WalkMe Asset*	ShoutOuts Big Center 545753 Right Corner 545756 Top Banner 547292 Walkthroughs 1824117	<i>[Typical assets that make up solution.]</i> <ul style="list-style-type: none"> • ShoutOuts • Survey • Smart WalkThrus

System Notifications



×

Helpful info?

Please rate how helpful this information is to you.
Rate from 0 (least helpful) to 10 (very helpful)

012345678910

Least HelpfulVery Helpful

Submit

Objective: Need to inform users about significant updates or changes in the system or policy in order to ensure timely awareness and engagement with the information.

Deliverables:

- Clear and timely system notifications.
- Efficient in-system communication channels.
- Informative messages detailing the updates or changes.
- Interactive notifications to engage users and ensure comprehension.
- Ongoing reminders or follow-ups for critical updates.

Goal: Increase user engagement with important information, ensuring that all users are aware of significant updates or policy changes in a timely manner.

“Jobs to be done” statements:

1. As a user, I need clear and timely system notifications about significant updates or changes, so that I am always aware of important information.
2. As a user, I need efficient in-system communication channels, so that I can quickly and easily access updates and changes.
3. As a user, I need informative messages detailing the updates or changes, so that I fully understand their impact on my workflow.
4. As a user, I need interactive notifications to engage with and ensure comprehension of the updates, so that I can adapt accordingly.
5. As a learning designer, I need to ensure system notifications are delivered effectively, so that user engagement with important information is increased.

Duration	1-3 days 2-4 weeks	Typically, not renewed because of new content. Because of the quick development try not to use user segmentation. Longer notifications about policy changes or other informs can leverage user segmentation.
WalkMe Asset*	See System Notifications	[Typical assets that make up solution.] <ul style="list-style-type: none">• ShoutOuts• Survey



Form Field Assistance

Selected element



Objective: Need to support users in completing online forms accurately in order to ensure successful submissions and reduce errors.

Deliverables:

- In-form tooltips to provide real-time assistance.
- Dummy text to guide users on the required information.
- Help buttons for additional support and clarification.
- Contextual prompts to highlight necessary fields.
- Interactive instructions to ensure accurate form completion.

Goal: Ensure accurate completion of forms, reduce errors, and facilitate successful submissions.

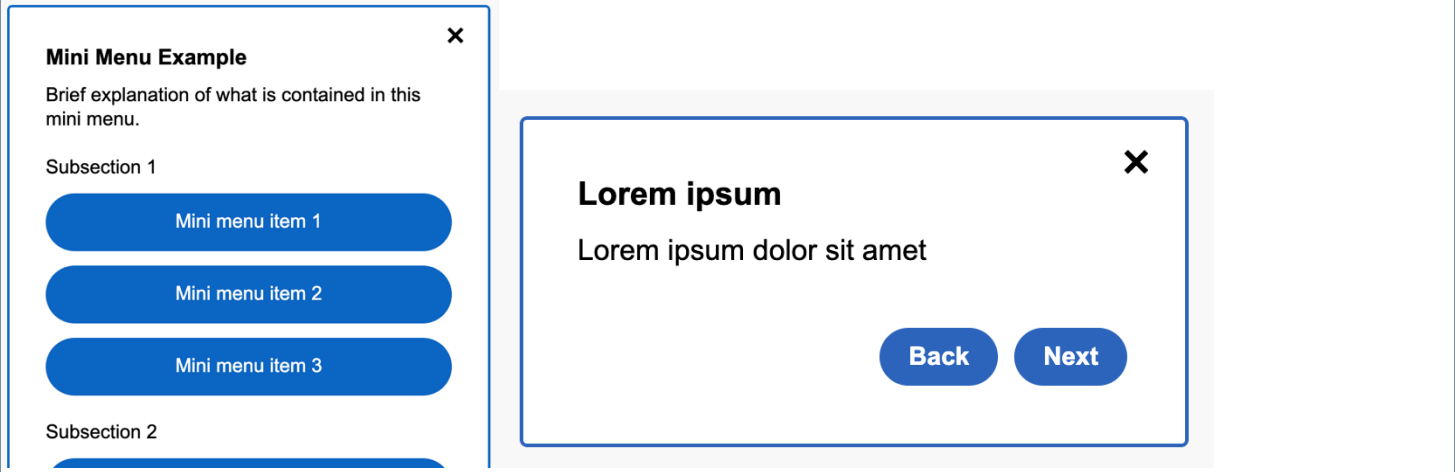
“Jobs to be done” statements:

1. As a user, I need in-form tooltips to provide real-time assistance, so that I can complete forms accurately.
2. As a user, I need dummy text to guide me on the required information, so that I know exactly what to input in each field.
3. As a user, I need help buttons for additional support and clarification, so that I can get immediate answers to my questions.
4. As a user, I need contextual prompts to highlight necessary fields, so that I do not miss any critical information.
5. As a learning designer, I need to ensure users receive accurate and relevant form field assistance, so that errors are reduced and successful form submissions are increased.

Duration	Max 60 days	If used just to inform about information related to the form or fields recommend duration of 2-4 weeks. If using to share templates or dummy text use a longer duration. Renew only if Insights shows usage.
WalkMe Asset*	SmartTips 1824169 Also see SmartTip recommendations	<i>[Typical assets that make up solution.]</i> <ul style="list-style-type: none">• SmartTips• Resources



Resource List



Objective: Need to empower users with self-service capabilities by providing a centralized hub of guides and documentation within the system in order to facilitate easy access to necessary resources.

Deliverables:

- Centralized “mini-menu” within the system for guides and documentation.
- Contextual placement of resources where users need them most.
- Comprehensive collection of information about system features and functionalities.
- Easy-to-navigate interface for quick access to relevant guides and documentation.
- Ongoing updates to the resource hub to include new and relevant information.

Goal: Facilitate easy access to necessary resources, empower users with self-service capabilities, and reduce dependency on external help sources.

“Jobs to be done” statements:

1. As a user, I need a centralized “help menu” within the system, so that I can easily access guides and documentation without leaving my workflow.
2. As a user, I need resources to be contextually placed where I need them most, so that I can find the information relevant to my tasks.
3. As a user, I need a comprehensive collection of information about system features and functionalities, so that I can self-serve my support needs.
4. As a user, I need an easy-to-navigate interface for quick access to relevant guides and documentation, so that I can efficiently find the information I need.
5. As a learning designer, I need to ensure the resource hub is regularly updated with new and relevant information, so that users have access to the most current support resources.

Duration	60-90 days	Typically paired with a Launcher, most effective when used with user segmentation. Renew based on Insights and business initiatives.
WalkMe Asset*	Walkthroughs 1824117	[Typical assets that make up solution.]



	Resources (List) 1869038 Launchers Big 776382 Small 776374	<ul style="list-style-type: none"> • Smart WalkThrus • Launchers • Resources
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****Note: WalkMe IDs provided here are based on the origin system of Dynamics 365. The standardized assets have been distributed to each system in the folder “[DAT PLAYBOOK] Assets”.***

Big Center ShoutOut have surveys attached to collect NPS and end-user feedback – DO NOT CHANGE THESE.

ShoutOut Levels (System Notifications)

Here we go over which ShoutOut template you should use per your use case. These alerts are specific to system issues/alerts ranging from blocker, critical and non-critical.

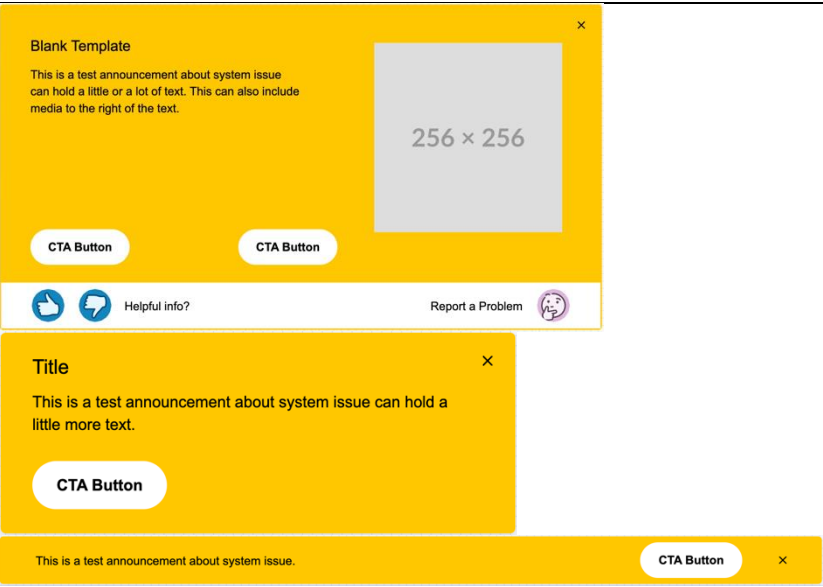
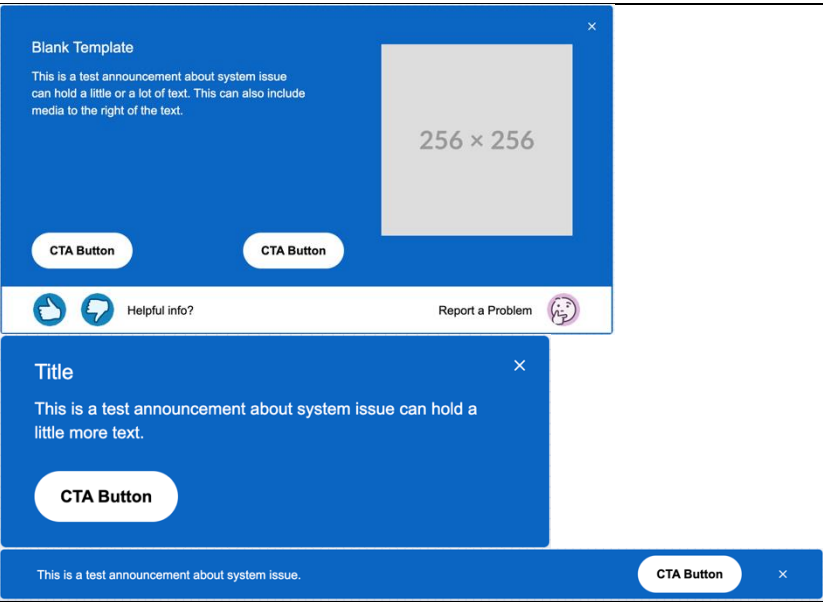
How-to:

1. Duplicate (make a copy of) the provided WalkMe asset using its template ID in the WalkMe Editor
2. Move the new copy to the appropriate project folder or location in the WalkMe Editor
3. Use the [Naming Convention Tool](#) to give the new asset a title
4. Edit as needed (reselect element, add steps, text content, etc)

Note: Big Center ShoutOut have surveys attached to collect NPS and end-user feedback – DO NOT CHANGE THESE.

Level	Template	WalkMe ID
Level 0 A Level 0 issue is a blocker that completely stops the user's work, has no known workaround, may lack an estimated time for resolution (ETA), and triggers system notifications to inform the user of the blockage and provide an ETA if available.		RED Big Center 543225 Right Corner 544377 Top Banner 543230



<p>Level 1</p> <p>A Level 1 issue is critical, impacting the user's ability to perform workflow tasks, potentially causing partial or complete stoppage or affecting data quality, but may have a workaround; system notifications inform the user of the issue, provide a workaround, and include an estimated time for resolution if known</p>		<p>YELLOW</p> <p>Big Center 543226</p> <p>Right Corner 544379</p> <p>Top Banner 543236</p>
<p>Level 2</p> <p>Level 2 issues are non-critical and not significant, but users should be aware of them, typically associated with product or feature releases/updates, with notifications providing details and an estimated time for resolution if known.</p>		<p>BLUE</p> <p>Big Center 539769</p> <p>Right Corner 544376</p> <p>Top Banner 543228</p>

SmartTips

The following icons are available for SmartTips for different uses, please refer to the suggestions below.





Notification, related to announcements



Check this out, new



Resources (mini menu)



Informational



Warning

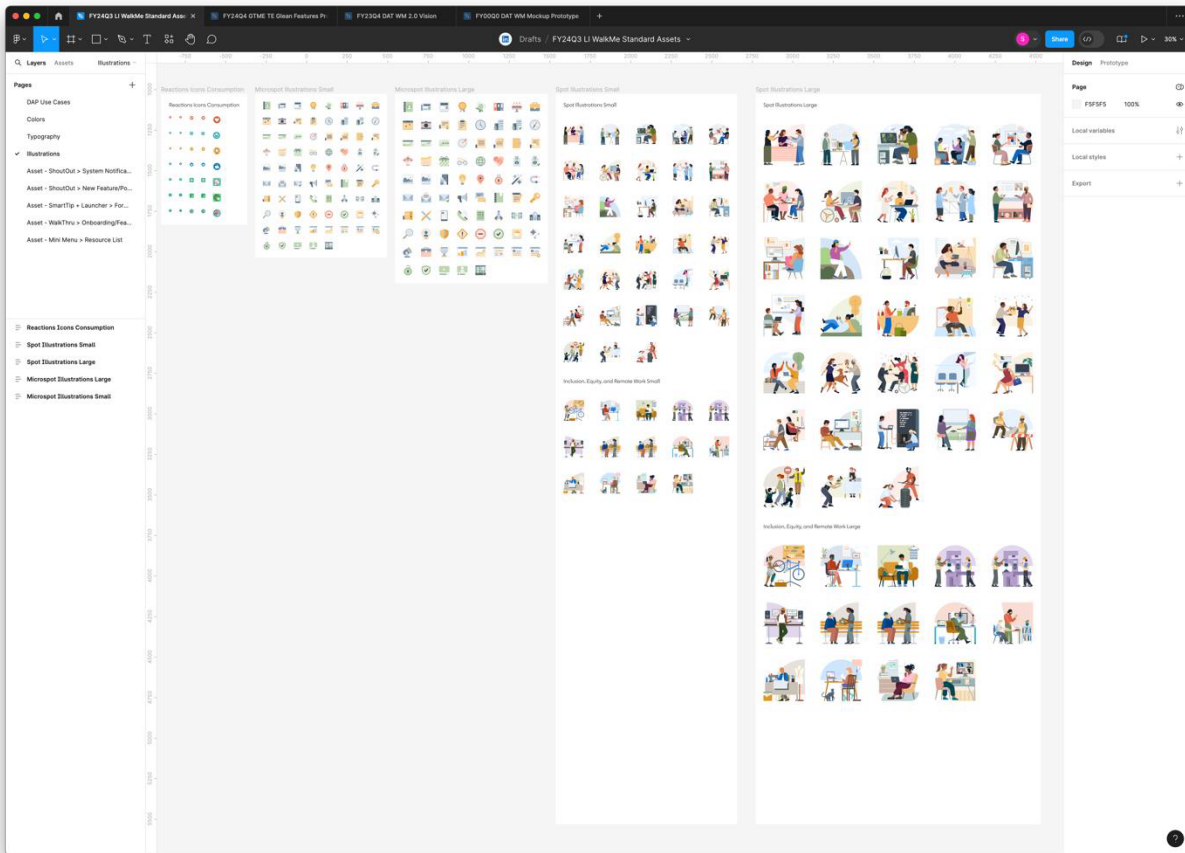
Links to Resources (User Guides, Videos, etc)

- Use Resources [Article/Video] or Shuttles to incase the link for your resource.
- Then link the Launcher or Shuttle to the intended text content in a balloon or walkthru step or wherever necessary.

This will help collect data on the number of users viewing the Resource or Shuttle.



Illustrations



- Figma WalkMe Illustrations: [REDACTED]
 - Exporting from Figma: <https://help.figma.com/hc/en-us/articles/360040028114-Export-from-Figma>
1. Refer to the Figma page for illustration resources aligned to LinkedIn’s Mercado styling.
 2. Select one that is appropriate for your WalkMe asset and export.
 3. Then upload to WalkMe asset in the appropriate designated area for graphics.

Naming Convention

WalkMe Naming Convention Tool: [GTME Platform - DAP WalkMe Naming Convention Tool.xlsx](#)

Use the provided tool to name your WalkMe Mockups/Storyboard, WalkMe Editor folders, and WalkMe assets.

- WalkMe Mockup/Storyboard Sample: “FY24Q4 LTS Sales SOLB Provisioning”
- WalkMe Editor Folder Sample: “FY24Q4 LTS Sales SOLB Provisioning #onboard”
- WalkMe Asset Sample: “FY24Q4 LTS Sales SOLB Provisioning – SWT”

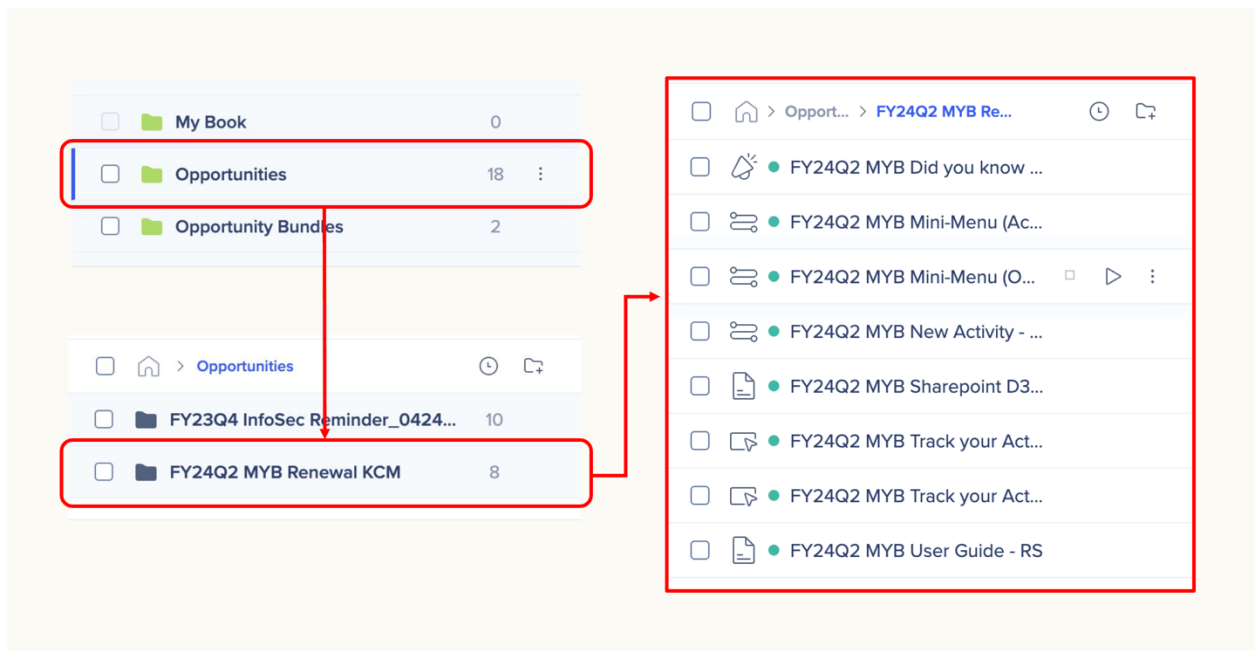


Category	Input	How-to
Fiscal Year	24	Type in the MSFT Fiscal Year
Quarter	4	Type in the Quarter number
Organization	LTS	Choose from dropdown the audience organization
Role	Sales	Choose from dropdown the audience role
System	SOLB	Choose the system/platform abbreviation
Brief Project Description (1-3 words)	Provisioning	Type in a very brief project description - recommend 1 to 3 words
NO NEED TO EDIT BELOW		
		Highlight cell and copy!
		This will be the name used for deliverables like mockups or Scribes associated with your WalkMe solution.
WalkMe MockUp Name	FY24Q4 LTS Sales SOLB Provisioning	
WalkMe Asset Tag	SWT	Choose an asset tag. If building WalkMe individual assests in the Editor - add a tag per asset
WalkMe Asset Name	FY24Q4 LTS Sales SOLB Provisioning - SWT	Highlight cell and copy!
Use Case Tag	#onboard	Choose a Use Case tag. Use this to create a name for your folder of assets in WalkMe Editor.
WalkMe Folder Name	FY24Q4 LTS Sales SOLB Provisioning #onboard	Highlight cell and copy!

Folder Organization

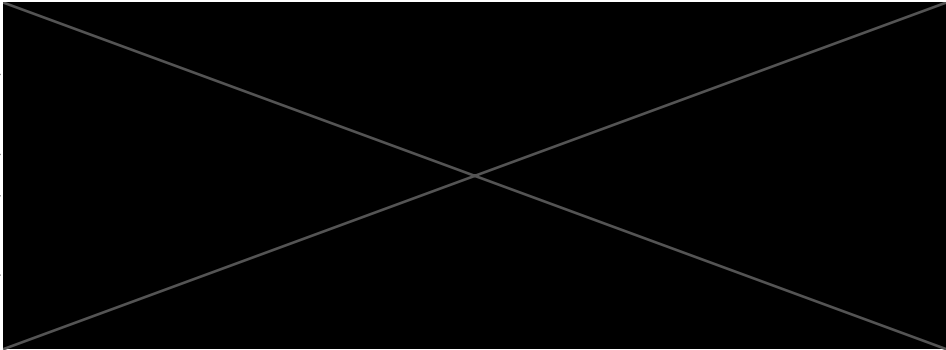
Each System has its own folder reflecting the organization of the system. Please place your solutions in the corresponding folder. Some solutions may appear in multiple areas of a system in that case place your solution where the user may see it first or have the greatest business impact.

D365 Folder Structure Sample



Common Tool URLs

Main System URLs

System	URLs
Dynamics 365	
Solution Builder	
Anaplan	
Salesforce	
TeamHub	

Dynamics 365 Subsystem URLs

Subsystems URLs (URL rule “contains”)	Sidebar Section Name
=dashboard&	Home/Dashboard/Hierarchy Explorer
=activitypointer&	Activities
=team&	Teams
=account&	Accounts
=contact&	Contacts
=in_account_team_member&	My Book
=lead&	Leads
=opportunity&	Opportunities
=in_opportunity_line_item&	Opportunity Line Items
=in_deal_credit&	Deal Credits
=in_deal_credit_line_item&	Deal Credit Line Items
=in_commissionable&	Commissionables
=ForecastingControls	Forecasts
=in_opportunity_bundle&	Opportunity Bundles
=incident&	Cases
=knowledgearticle&	Knowledge Articles

User Segmentation by CSV Integration

CSV Integrations: <https://support.walkme.com/knowledge-base/incoming-csv-integration/>



Follow these directions to create CSV integrations per system in the Admin center to segment solutions. We can only segment users by email. CSV file must include user name and email address.

CSV File Limitations:

- File size should not exceed 30 MB
- Only one sheet allowed
- File should not exceed 1,000 columns
- Column names should not exceed 127 characters
- Data in any cell must be 2047 characters or less
- The following characters are used for formatting and should not be included in the file:
 - \n
 - **Note:** Only applies to lowercase n
 - "
 - ,
- After uploading a CSV file, it cannot be downloaded

jQuery Escalation




jQuery Selector: <https://support.walkme.com/knowledge-base/walkme-jquery-cheatsheet/>

If you know how to pick elements from HTML to create jQuery selectors please follow the best practices from the resource.

If you are not familiar with using jQuery – follow the escalation process severity level medium.

Solution Mockups (Figma, Storyboard, Scribe)

Figma

- Figma Mockup Template: 


- Duplicate this Figma file using the premade components to quickly mockup solutions to showcase to stakeholders.
- Export the frames to include in your Storyboard file to help visual the balloon content.

Storyboard Template

- Storyboard Template Word Doc: [FY00Q0 WM Solution Storyboard TEMPLATE.docx](#)
- Use this template to mockup content and the flow of your WalkMe solution.
- Utilize Figma Mockup Template to create visuals.

Scribe

- Use Scribe to capture steps in system and use its annotation features to create mockups of the WalkMe solution.



- Once the Scribe is created use the content areas to mockup content for balloons.
- Have SMEs and stakeholders sign up for Scribe to provide feedback on the mockup.

Goal Setting

- <https://support.walkme.com/knowledge-base/goals/>

Goals are a great way to align WalkMe solutions to a specific metric that is trying to be reached to quantify if the intervention is successful.

- Align with stakeholders what a good metric might be for this solution:
 - What behavior are they trying to change?
 - What might be a good indicator of that change?
- For example, we might want to track success or error rates. Maybe we can make our Goal if a user clicks a specific button or element of the UI that helps us indicate if they successfully completed an action or that they went down the wrong path. We may also want the Goal to be if they reached a certain point in the process, which can be identified by the URL or a specific element on the page.
- Goals are setup within each specific WalkMe element.

Tracking User Actions (Tracked Events & Funnels)

Tracked Events

- <https://support.walkme.com/knowledge-base/insights-what-are-tracked-events-and-how-are-they-used/>

Like Goals, Tracked Events are used to quantify specific user actions in a system. But Tracked Events are not attached to specific WalkMe elements – as long as WalkMe extension is setup for the system, you can create a Tracked Event.

Funnels

- <https://support.walkme.com/knowledge-base/insights-what-are-funnels-and-how-are-they-used/>

Funnels can be thought of as an ordered checklist of Tracked Events. Use Funnels to a workflow that uses Tracked Events as milestones along it. Funnels can help identify pain points in a workflow. Funnels are not attached to any specific WalkMe assets and live independently.

Content Writing (UX Writing)

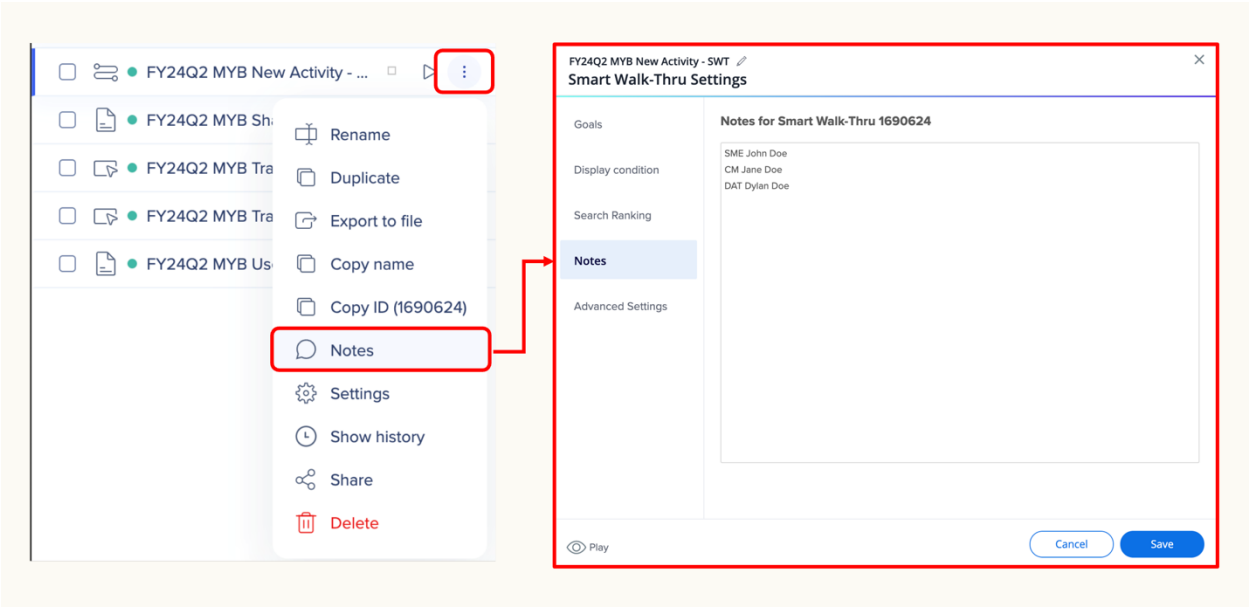
- Make sure content is short, simple, use plain language.
- Aim for a reading level of grades 6 or 7 for easy consumption.
- Make it action-oriented, use verbs.
- Use Hemingway Editor to help edit your copy: <https://hemingwayapp.com/>



Review

Quality Assurance

- Ensure your Rules are correct following best practices like grouping date and using “From” and “Until” for a proper date range: <https://support.walkme.com/knowledge-base/rule-engine/#creating-a-rule>
- Ensure URL Rules use “Contains” if using portions of URLs you can also give URLs some fuzziness; e.g. li.dynamics.com can equal *dynamics.com/* which would allow WalkMe to launch the solution on sites that contain [dynamics.com/] portions of URL
- Add Notes to your assets including but not limited to the Subject Matter Expert (SME), Change Management (CM), and Digital Adoption Team (DAT) project members.



Troubleshooting

Critical Troubleshooting

- Check if WalkMe is having a system issue: <https://status.walkme.com/>
- If no system issue, please submit a ticket via WalkMe’s support portal: <https://community.walkme.com/s/contactsupport>
 - Add any project team members or collaborators on the ticket to monitor responses
 - Included various screenshots of the issue
 - If you need to submit a ticket, expect this to add an additional minimum of 3-5 days to the project depending on severity.
- If there is a WalkMe system outage, please proceed with notifying PE:
ENGAGING PE-COMMS:

Bugs/Issues/Maintenance	As needed	PE	Will be sent from PE-Communications mailbox <ul style="list-style-type: none">• New technical support services go lives• Changes to existing technical support channels
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- Outage or bug related announcements
- License deactivations/downgrades

- Blocker form:

[b8a](#) - recommend the issue identifier fill out key incident info

- For issues but not a blocker, a WM comms in-app could work or possibly a PE-Comms through their normal (non critical) request channel here:

Test vs Production Issues

- Most common issues are solutions working in Test and not in Production, vice versa. This will require an escalation and possibly submitting a WalkMe Support ticket:
<https://community.walkme.com/s/contactsupport>
- First try reselecting the element in Production rather than Test or the opposite of where you were building.
- If it appears that there are multiple elements with the same name or the element is within a module, this may require jQuery – follow the escalation process OR submit an “Assist Me” ticket within the editor.

< > Track your Activities
Step Options ⓘ

Assist Me

Interaction

Click on a preview item to edit

Change Design | Edit CSS

Appearance

Selected Element

Notes

Size | B I U A | [Icons]

Track your Activities

It is important to track your activities as Key Customer Moments in your renewal sales cycles to ensure well documented customer interactions.

[Show me how](#)

[Open User Guide](#)

Next

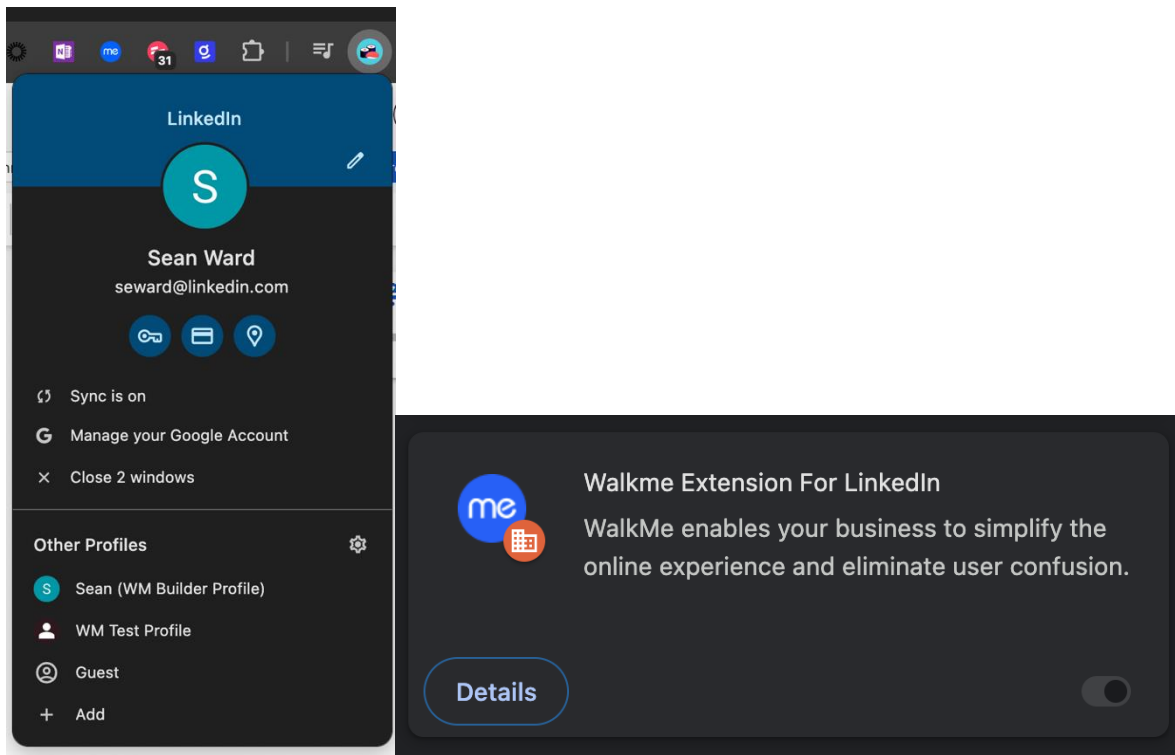
Position ⓘ

Balloon Position | From Top | From Left | Align to Text

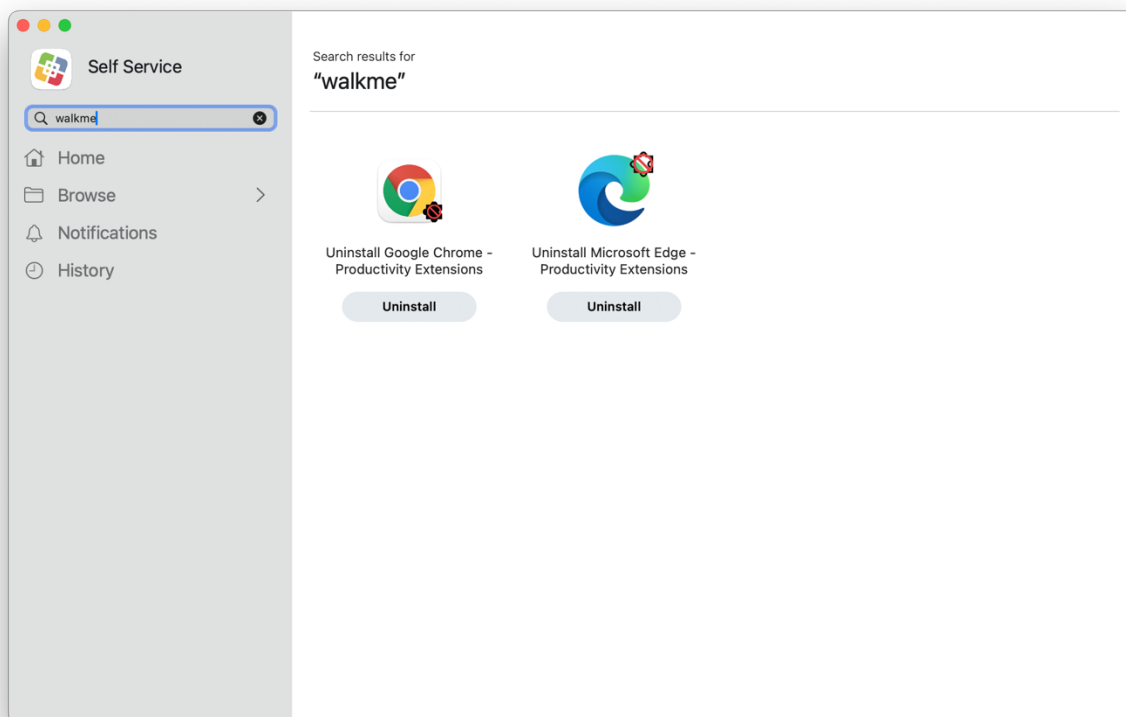
Edit on Page | Play | Re-select element | Cancel | Done

WalkMe Not Appearing

- Some end users do not have the WalkMe Extension installed or they are working within a Chrome Profile that is a personal email address. Have the end user share their Chrome Profile information and their Chrome Extension manager.



- If end user does not have WalkMe Extension installed, have them install via Self Service app.



WalkMe Extension Not Working on URL

1. Contact DAT PM or DAT SLC to make sure the URL is included in the URL Manifest.
2. If URL is part of the URL Manifest, submit a ticket to WalkMe Support.

DAT Review

1. If unsure what troubleshooting path to take schedule a meeting with DAT PM or DAT SLC to review the issues.
2. If DAT PM or DAT SLC is unavailable submit a ticket to WalkMe Support.

Publish

- First publish to Test environment for stakeholders and DAT to ensure the solution is working properly and make any adjustments.
- Once solution is confirmed working in Test, get sign off from stakeholders to publish to Production.
- After publishing to Production retest in the live environment to ensure the solution is working properly and no change has happened from Test to Production.

Keep both solutions published to Test and Production to ensure mirrored environments, this helps ensure predicting WalkMe solution behavior when multiple WalkMe solutions are published in the same system.

Sandbox Environments

- **We rarely get access to ENG Sandbox to build WalkMe solutions before they launch to Test. When we do you will be able to build the solution using the Sandbox environment elements, but you will not be able to publish the solution to Test environment to troubleshoot. You must wait until the Sandbox is launched to Test or Production to troubleshoot and most likely reselect elements.**

Update

Decisions Matrix to Renew or Archive

- **Criteria Definitions**
 - **Effort (Low, Medium, High):**
 - **Low:** Minor tweaks or updates required; minimal resources needed.
 - **Medium:** Moderate updates involving some redevelopment; considerable resource involvement.
 - **High:** Extensive redevelopment required; significant resource and time investment.
 - **Data (Usage Low, Medium, High):**
 - **Low Usage:** Few interactions or low user engagement, indicating limited utility or obsolescence.



- **Medium Usage:** Regular interactions, showing moderate utility to users.
- **High Usage:** Frequent interactions and high engagement levels, indicating high utility and relevance.
- **Priority (Low, Medium, High):**
 - **Low Priority:** Little to no impact on strategic objectives if removed.
 - **Medium Priority:** Somewhat important to strategic goals; impact is manageable if removed.
 - **High Priority:** Critical to strategic objectives; significant impact if removed.
- **Decision Guidelines**
 - **Renew if:**
 - Effort is Low regardless of Data and Priority.
 - Priority is High and Data is Medium or High, even if Effort is Medium.
 - Data is High and Priority is Medium or High, even if Effort is Medium.
 - **Archive if:**
 - Effort is High and both Data and Priority are Low.
 - Priority is Low and Data is Low, regardless of Effort.
 - Data is Low and Priority is Medium or Low, and Effort is Medium or High.
 - **Review if:**
 - Mixed signals from criteria, such as High Effort, High Data, and Low Priority.
 - Medium across all criteria, suggesting a closer look is needed to make a decision.
- **Implementation Steps**
 - **List All Solutions:** Gather a list of all current WalkMe solutions deployed.
 - **Gather Data:** Compile usage data, maintenance effort records, and align each solution with strategic priorities.
 - **Score Each Solution:** Use the criteria to score each solution.
 - **Apply the Matrix:** Place each solution in the matrix and apply the decision guidelines.
 - **Review Regularly:** Set up a regular review cycle to reassess solutions, especially those marked for review, to ensure ongoing relevance and effectiveness.

- **Scorecard Example**

Solution	Effort	Data	Priority	Decision
Example 1	Low	High	High	Renew
Example 2	High	Low	Low	Archive

Pending Archive

- Notify SME/CM/Stakeholders of the Renew or Archive decision depending on Decision Matrix.
- Depending on if the Effort score is Medium or High, a new request should be made to ensure TE has capacity.



Archive

When archiving:

1. Archive all assets from BOTH Test and Production environments.
2. Move all assets to system Archive folder – typically named “System” Archive.



D365 Archive

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DAT PM or DAT SLC should conduct a quarterly review to Archive old assets that have missed this process.

Delete

No assets are to be deleted unless unused Drafts.

