



# GTME TE In-System End User Survey Overview

Learning Materials and Support Resources  
Satisfaction

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# Executive Summary

# Executive Summary

## Context:

PMM's "Day in the Life" study revealed key tasks, challenges, and needs for Sales Representatives. These insights helped TE's DAT TechTransform team understand end users' experiences and make assumptions about their needs and challenges with Learning Materials and Support Resources, and how these resources support their work.

## Objective:

DAT TechTransform conducted a survey of end users within their tools to validate assumptions. The main goal was to understand how feature enhancements and new releases affect user workflows and tasks by gathering insights into their needs, challenges, and preferences for enablement materials and support systems.

## Insights:

DAT TechTransform gathered responses from 118 end users across 6 systems (D365, SFDC, SF Lightning, Anaplan, Solution Builder, CSP) in 8 business days. The primary audience, Sales Reps, made up 43% (51 people) of the respondents and were scattered across the globe. The answers collected helped validate our assumptions but left gaps to further investigate through our recommendations.

## Recommendations:

- Implement a tool (e.g. Glean extension) to know what system or tool a user is currently working in, allowing users to easily search whenever, wherever.
- Investigate and enable a single point of entry (e.g. Glean) for all training and performance support resources.
- Pilot a peer-led social learning program using private LinkedIn.com groups to provide updated information, where colleagues can engage and reshare content easily.
- Pilot the use of a Glean App trained on specific content for a specific initiative to enable a segment of users with accurate content, concise answers, and simple automated actions.



Sales Representative  
(LMS, LSS, LTS)

"Our CRM is overwhelming, with multiple departments and dashboards that don't align with our workflows.

We need a more rep-centric approach, where tools are designed with our needs in mind, not just for managers or the organization.

The lack of updated, centralized resources often forces us to search externally for answers, making it difficult to complete tasks efficiently."

Assumption	Jobs to be done		Recommendations
People need to retrieve information multiple times a day, but it takes them a long time to find it.	Efficiency & Productivity	"I want to quickly find accurate, relevant information centralized in one location, reducing search time and enabling me to complete tasks faster, stay focused, and meet deadlines with less effort."	Enable Glean to know what system or tool a user is currently working in, allowing users to easily search whenever, wherever.
People often find what they need, it meets their needs but may have some outdated information.	Accuracy & Relevance	"I want to rely on a tool with AI-enhanced search capabilities to ensure accurate and relevant search results, minimizing frustration and providing the best available information."	Make Glean the single point of entry for all training and performance support resources.
People primarily rely on colleagues for direction.	Independence & Confidence	"I want to confidently use a system that provides updated, well-maintained information, allowing me to work independently without needing to seek assistance from colleagues."	Pilot a peer-led social learning program using private LinkedIn.com groups to provide updated information, where colleagues can engage, create, and reshare content easily. [Viva Engage is a platform owned by MSFT, MSFT is updating Viva apps]
People use resources to resolve troubleshooting or daily tasks.	Access & Usability	"I want to access content across various repositories seamlessly, without worrying about outdated information or permission issues, so that I can find what I need without administrative barriers."	Pilot the use of a Glean App trained on specific content for a specific initiative to enable a segment of users with accurate content, concise answers, and simple automated actions.

# Appendix



					118 Responses	43% (51) Sales Reps
Results	LOB	LMS	LSS	LTS	Themes	
	Sales Reps (51)	23% (12)	20% (10)	57% (29)		
<b>Search</b> The process users engage in when they know what they need and take steps to find it.	Triggers for	1. Problem-solving or troubleshooting 2. Completing daily tasks 3. Policy or process updates	1. Completing daily tasks 2. Preparing for meetings or presentations 3. Problem-solving or troubleshooting	1. Problem-solving or troubleshooting 2. Completing daily tasks 3. Preparing for meetings or presentations	Users search when trying to complete daily tasks like preparing for meetings or reviewing updates or overcoming blockers.	
	First to	1. Colleagues 2. SharePoint (Blueprint Tools Learning Center, team sites) 3. Glean	1. Colleagues 2. SharePoint (Blueprint Tools Learning Center, team sites) 3. Tied: Glean / HelpIn	1. Colleagues 2. SharePoint (Blueprint Tools Learning Center, team sites) 3. HelpIn	Users' natural inclination is to reach out to a colleague for information before using any internal knowledge base.	
	(Why) Need to	Multiple times a day	Multiple times a day	Multiple times a day	Users search for information multiple times a day.	
<b>Discovery</b> The outcome of the search process, where users successfully locate what they need.	Frequency	Frequently (find what I need)	Frequently (find what I need)	Frequently (find what I need)	Users frequently find what they are looking for after searching.	
	Time to	10-20 minutes	10-20 minutes	10-20 minutes	Users spend between 10-20 minutes each time they need to search for information before discovering a relevant result.	
	Relevancy	50%	50%	52%	Users find that results from search are up to 50% accurate or relevant to solve their search trigger or need.	
<b>Obstacles</b> The challenges users face when searching for or discovering resources.	Challenges	1. Information is scattered across multiple tools or locations 2. Outdated or incorrect information 3. Lack of training on how to find information	1. Information is scattered across multiple tools or locations 2. Outdated or incorrect information 3. Difficulty accessing information because of permission issues	1. Information is scattered across multiple tools or locations 2. Outdated or incorrect information 3. Difficulty accessing information because of permission issues	Users main challenges when trying to find content that resolves their needs is that information is spread out across many different repositories, often is outdated or not maintained, or they do not have the right permissions to access it.	
<b>Solution</b> The potential solutions users might want to see to help them search and discover resources	Preferences	1. Using a centralized information portal with search functionality 2. Accessing more streamlined and organized documentation 3. Utilizing enhanced digital tools with AI-powered search and	1. Using a centralized information portal with search functionality 2. Utilizing enhanced digital tools with AI-powered search and automations 3. Accessing more streamlined and organized documentation	1. Using a centralized information portal with search functionality 2. Accessing more streamlined and organized documentation 3. Utilizing enhanced digital tools with AI-powered search and	Users would prefer to use a tool or system that organizes and centralizes all necessary information so they can easily search and discover more consistently and confidently. A tool or system that has AI capabilities to enhance or aid in search and discovery as	

# Themes

Category	Definition	Recommendation	Initiatives
Desire for Centralization and Streamlined Access	<ul style="list-style-type: none"> <li>Centralized, up-to-date information that is easy to access and search is a major demand. Employees want a single portal or repository that integrates all relevant data and documentation.</li> </ul>	<ul style="list-style-type: none"> <li>Create a single, centralized portal that houses all necessary resources, with integrated AI-powered search and chatbots for easier access.</li> </ul>	<ul style="list-style-type: none"> <li>PE Glean Implementation</li> <li>GTME IKF SNOW Centralization</li> </ul>
Improving Search Capabilities	<ul style="list-style-type: none"> <li>Enhancing the search functionality across platforms is a priority. Employees want more accurate, reliable, and faster search results, potentially through better AI integration.</li> </ul>	<ul style="list-style-type: none"> <li>Invest in enhancing internal search tools like Glean to make them more reliable and comprehensive in their ability to search across all information sources.</li> </ul>	<ul style="list-style-type: none"> <li>GTME IKF SNOW Centralization</li> <li>GTME TE TechTransform Project Ignite</li> <li>GTME TE TechTransform PE Glean Partnership</li> <li>PE Glean Implementation – integration with SNOW and Lamabot</li> </ul>
Addressing Information Quality and Consistency	<ul style="list-style-type: none"> <li>There is a need to ensure that all information is current, accurate, and consistent across different systems. This includes regular updates and clear version control.</li> </ul>	<ul style="list-style-type: none"> <li>Establish processes for regular updates and audits of all documentation to ensure information is accurate and consistent across all platforms.</li> </ul>	<ul style="list-style-type: none"> <li>GTME IKF SNOW Centralization</li> <li>GTME TE TechTransform Project Ignite</li> <li>GTME TE TechTransform Content Lifecycle</li> <li>PE Glean Implementation – integration with SNOW and Lamabot</li> </ul>
User-Friendly Tools and Systems	<ul style="list-style-type: none"> <li>Employees are calling for more user-friendly tools with intuitive interfaces and fewer barriers (like frequent authentications). Simplifying the user experience is key to improving efficiency.</li> </ul>	<ul style="list-style-type: none"> <li>Redesign or streamline current tools and systems to be more user-friendly, reducing unnecessary steps and improving overall efficiency.</li> </ul>	<ul style="list-style-type: none"> <li>PMM Tool Improvement Roadmap in collaboration with Product (TBD)</li> </ul>
Enhanced Collaboration and Communication	<ul style="list-style-type: none"> <li>Improved collaboration between teams, especially in terms of information sharing and communication, is necessary. Employees want more responsive and aligned cross-functional support.</li> </ul>	<ul style="list-style-type: none"> <li>Strengthen communication and collaboration between departments to ensure that information is easily accessible and consistently shared across teams.</li> </ul>	<ul style="list-style-type: none"> <li>TBD</li> </ul>

# Insights

Category	Definition
Centralization and Access to Information	<ul style="list-style-type: none"><li>• Employees express a strong need for a centralized, easily accessible portal that consolidates all necessary resources. They want a single source of truth that integrates information across departments and roles, reducing the time spent searching for information.</li></ul>
Search Functionality	<ul style="list-style-type: none"><li>• There is significant dissatisfaction with current tools (e.g., Teams, SharePoint, and internal search engines like Glean). Employees often find content these tools surface unreliable, outdated, and less effective than using external search engines like Google to find helpful resources. The clunky and fragmented search experience is a recurring pain point.</li></ul>
AI Integration	<ul style="list-style-type: none"><li>• While there is interest in AI tools (e.g., Glean, CoPilot) for improving search and access to information, employees feel these tools are still in early stages and not yet fully reliable. Some employees even find that AI tools, in their current state, waste more time than they save.</li></ul>
Outdated and Inconsistent Information	<ul style="list-style-type: none"><li>• A recurring theme is the frustration with outdated, conflicting, or incomplete information across different platforms and documentation. This inconsistency leads to confusion, inefficiency, and errors in work processes.</li></ul>
User Experience and Tooling	<ul style="list-style-type: none"><li>• Employees highlight poor user experiences with current tools and platforms, especially with CRM systems like Salesforce, D365, and systems like Merlin. Issues such as clunky interfaces, unnecessary pop-ups, and the need for multiple authentications hinder productivity.</li></ul>
Cross-Functional Communication and Collaboration	<ul style="list-style-type: none"><li>• There is a lack of cross-functional communication and collaboration, particularly in getting accurate and timely information. Employees often have to rely on peers or crowdsource information, which is not an efficient or reliable process.</li></ul>



Objective: Conduct a thorough analysis of end-users to gather insights into their needs, challenges, and desires related to satisfaction of enablement materials that support their tasks in-systems.

Survey has offered validation of assumptions gathered from PMM's study "Day in the Life":

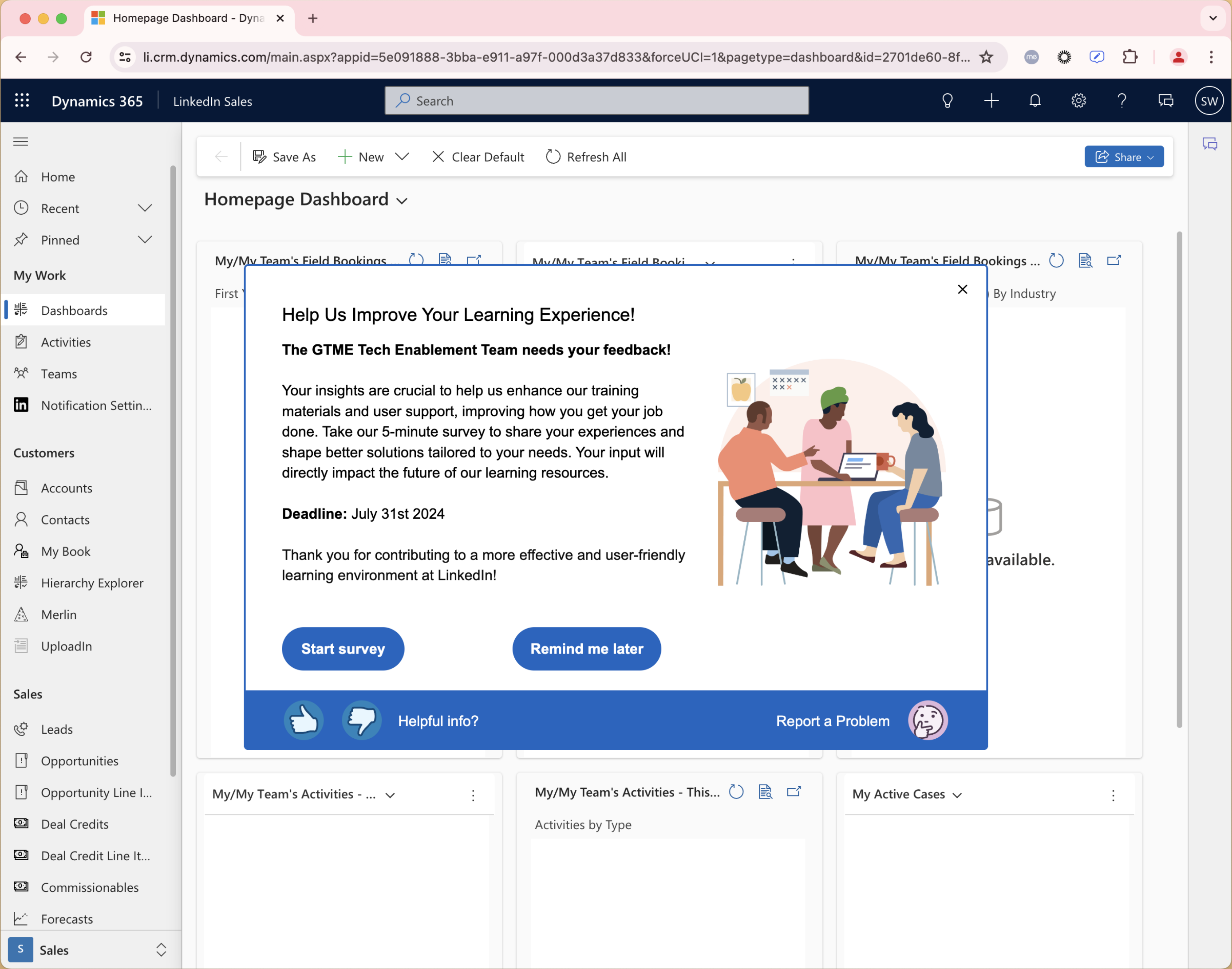
- People primarily rely on colleagues to provide direction
- People use resources to resolve troubleshooting or daily tasks
- People need to retrieve information multiple times a day, but it takes them a long time to find it
- People often find what they need, it meets their needs, but may have some outdated information

Survey distributed in-system:

June 28 – July 9

D365  
SFDC  
SF Lightning  
Anaplan  
Solution Builder  
CSP

Respondents 118

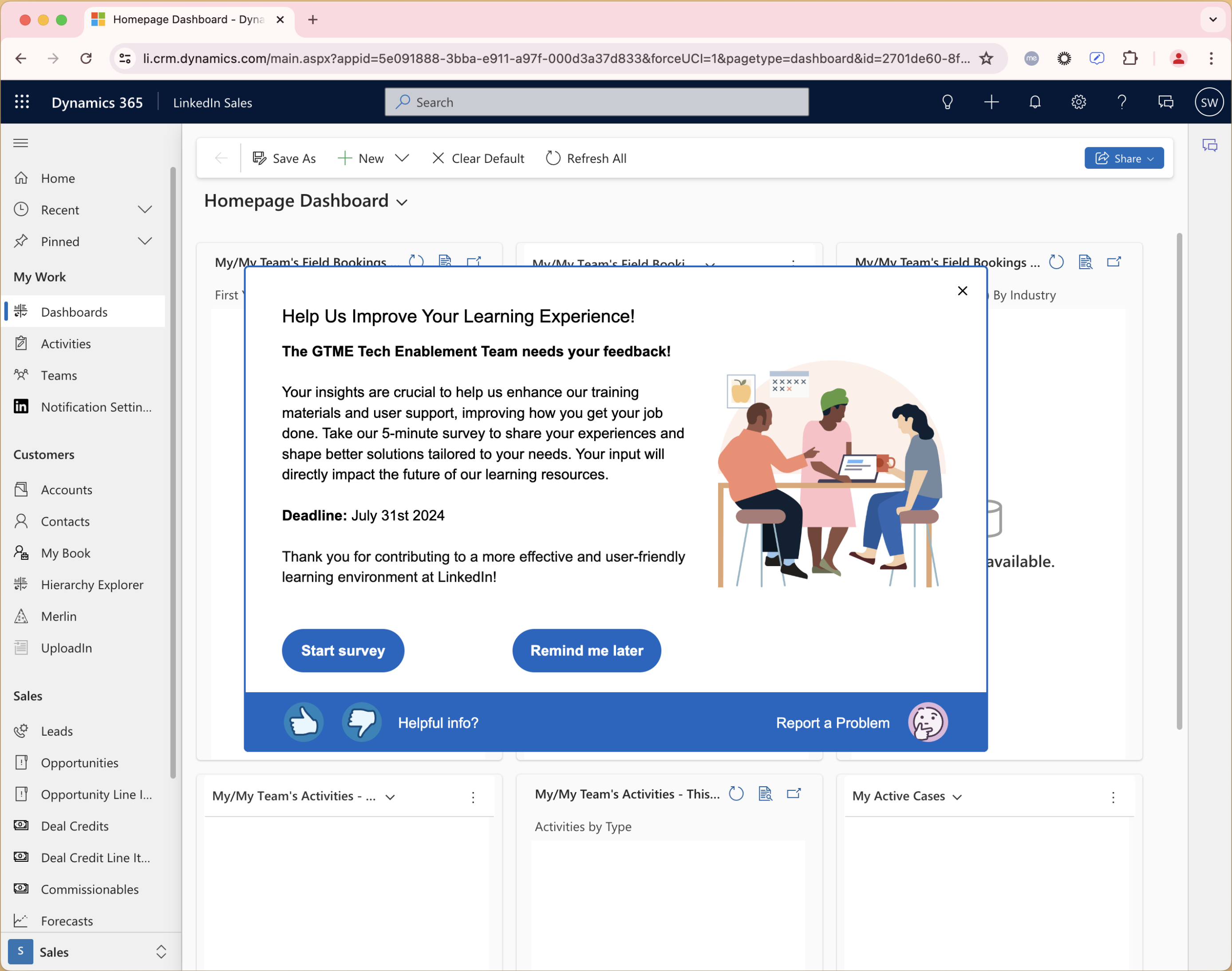


# Documentation:

Project Brief

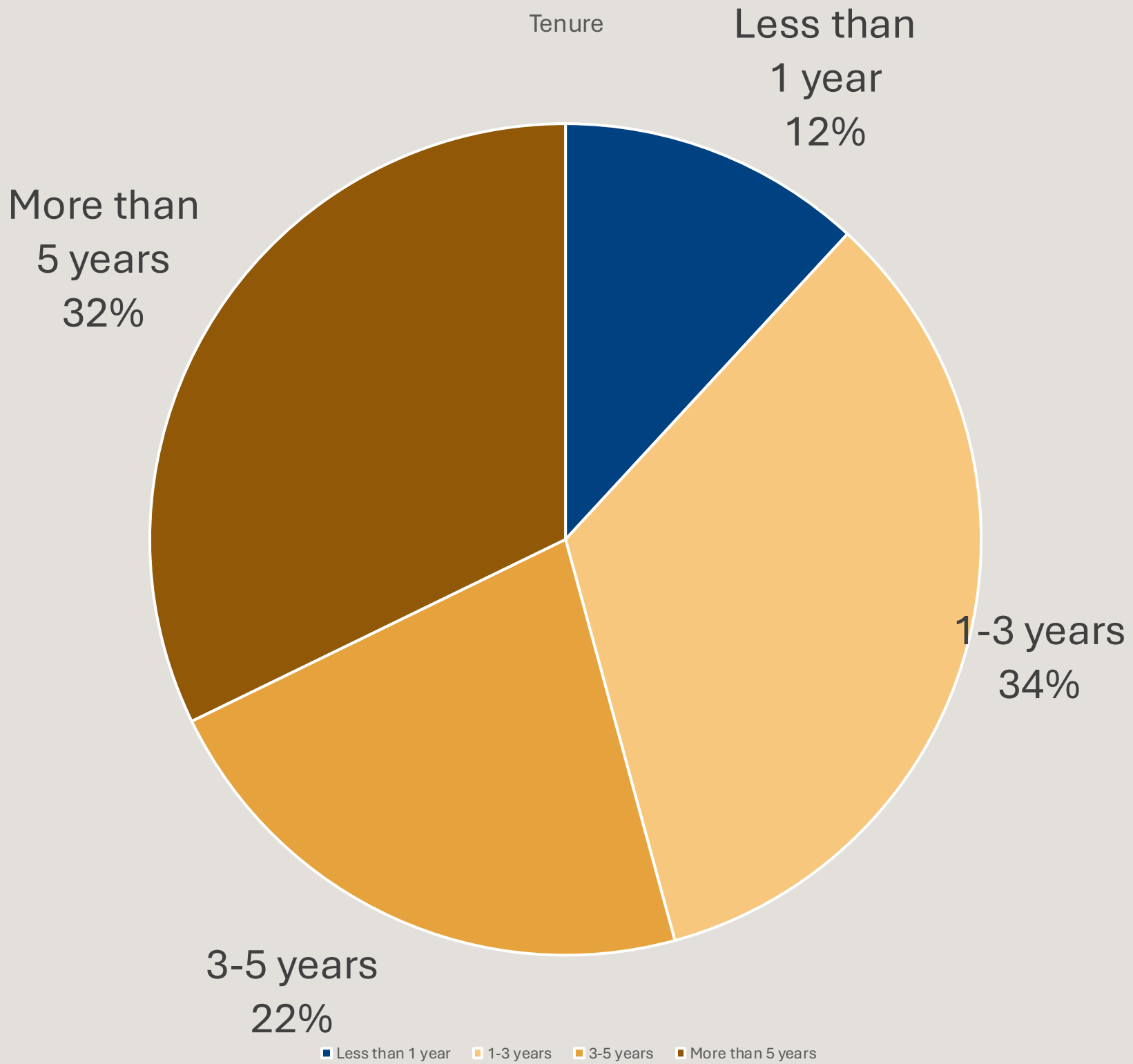
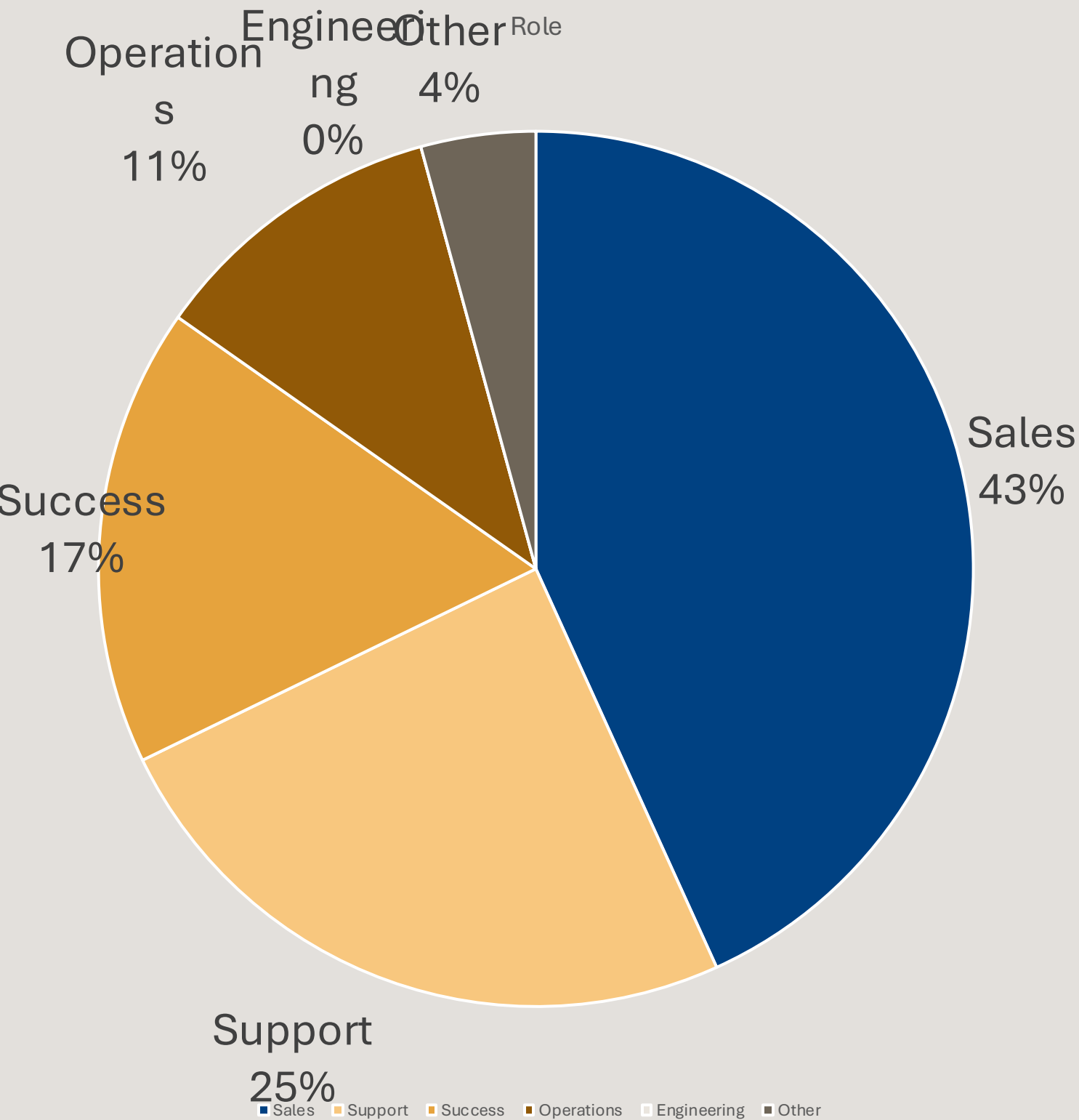
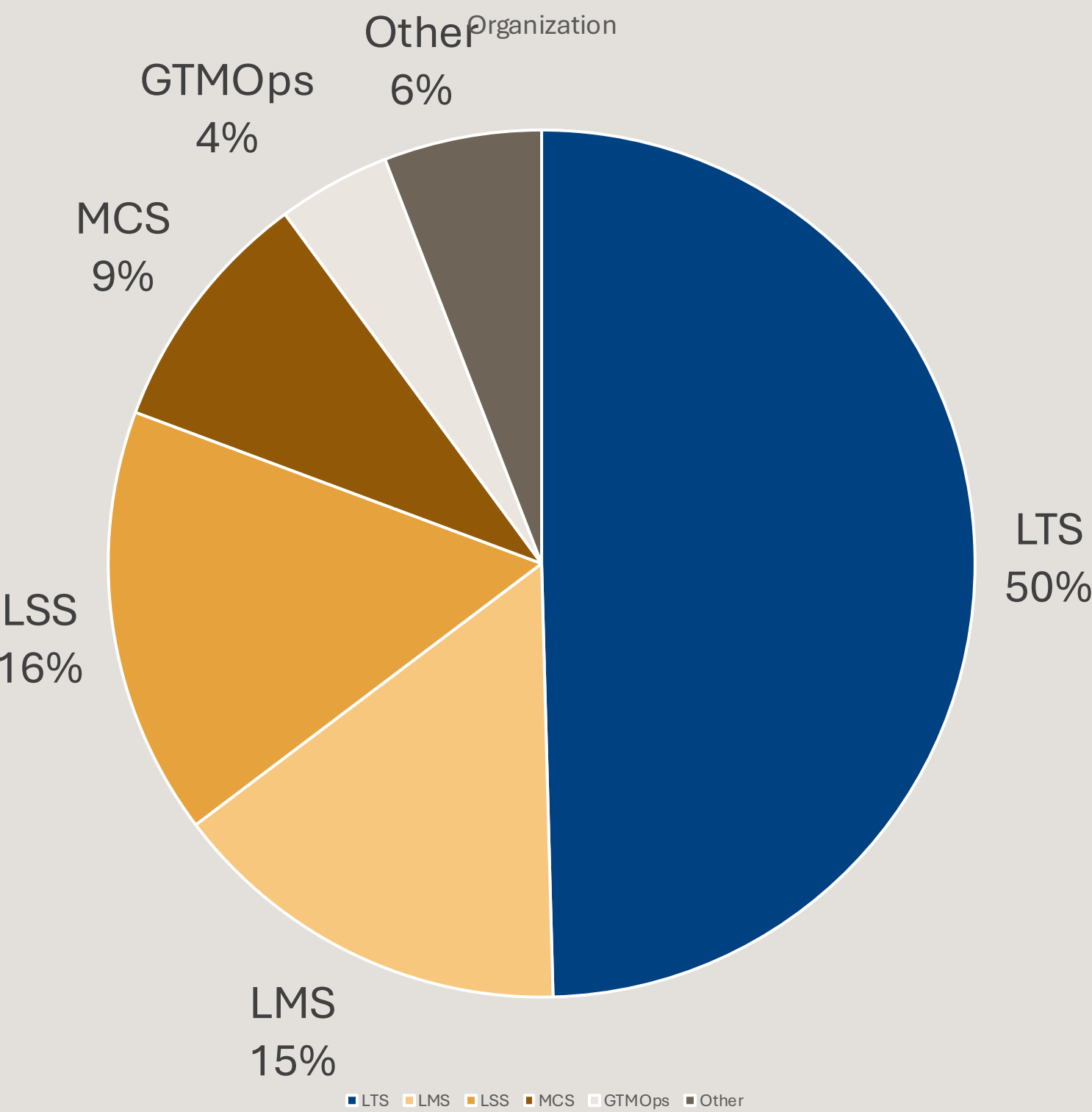
Survey Summary

Survey Results Excel



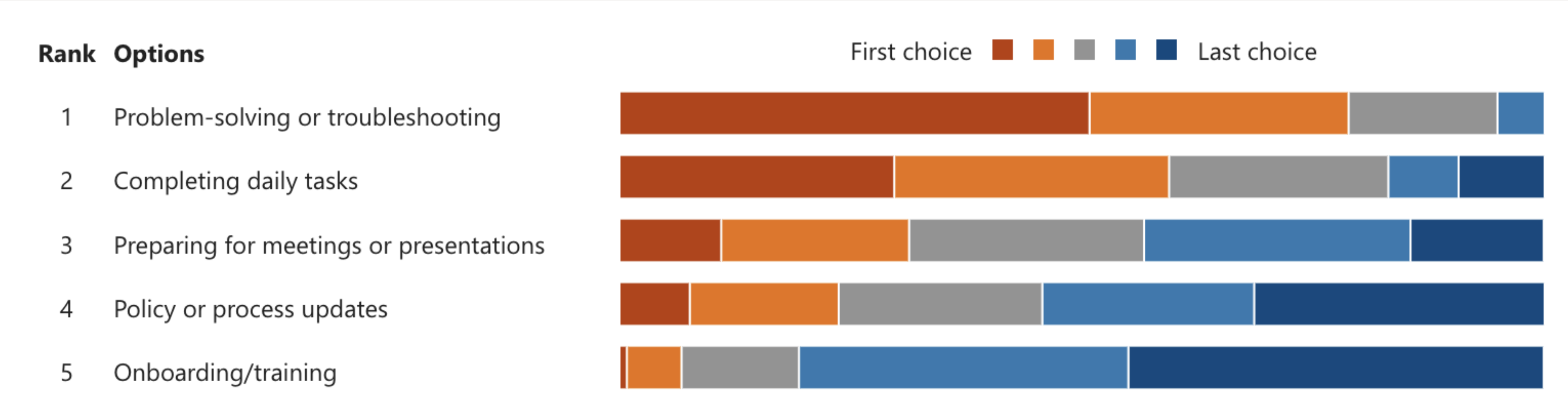


# User Background

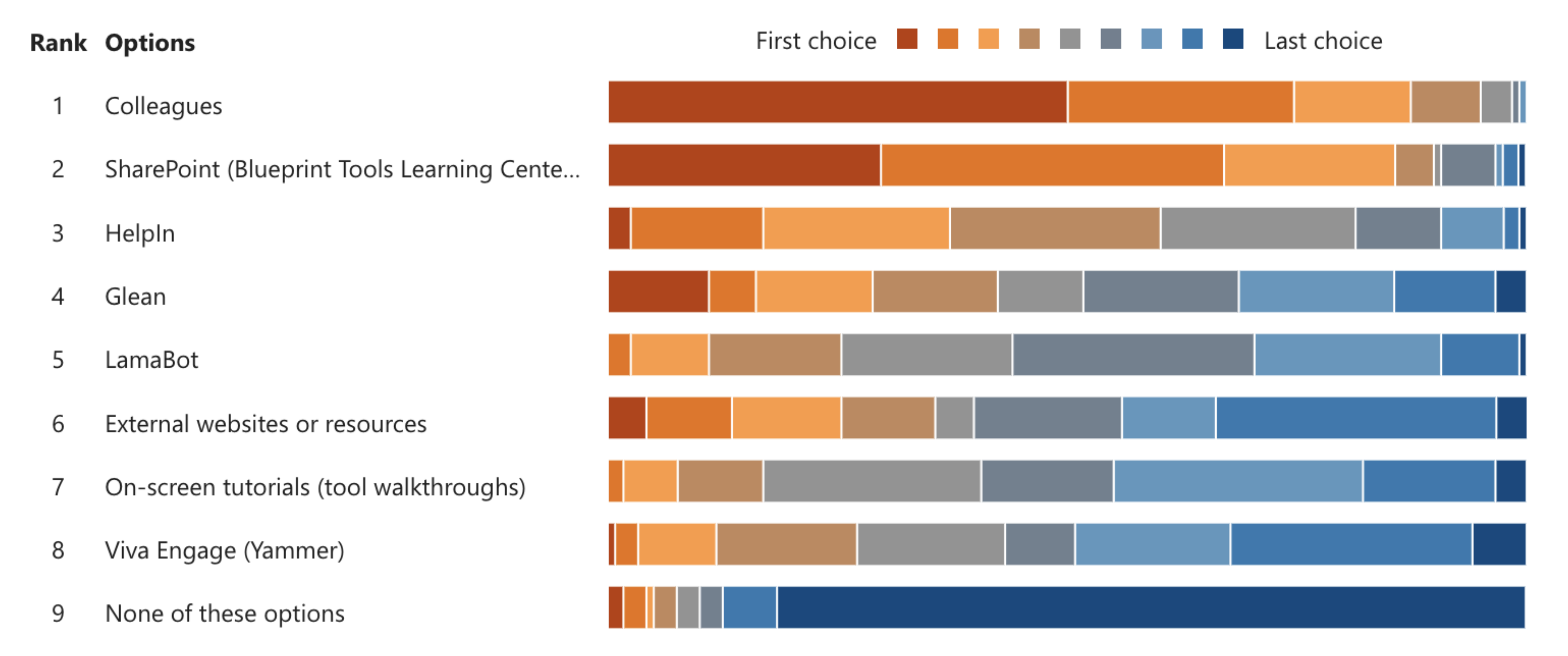




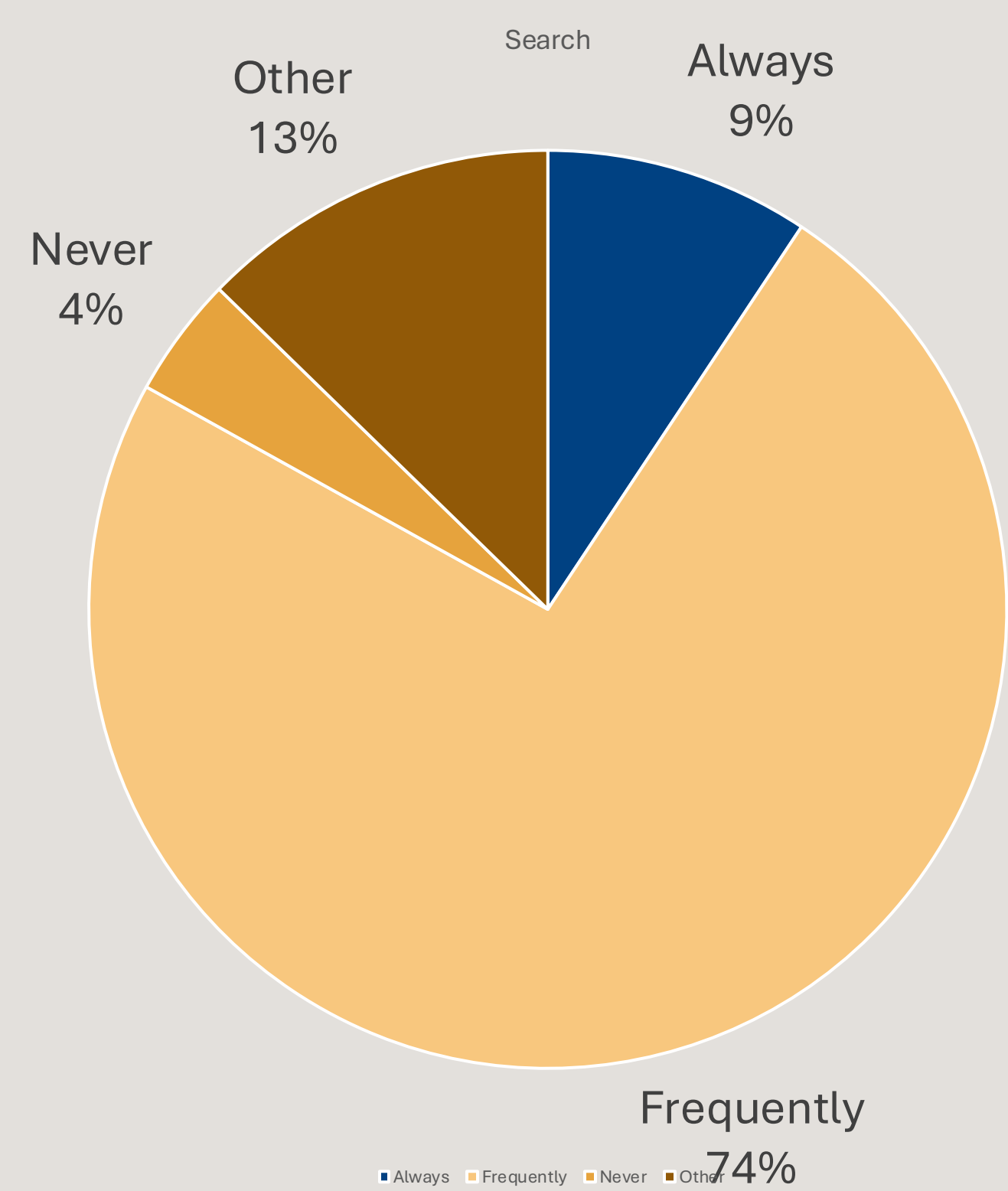
# Rank the following triggers that make you look for information or support



# Rank the following places where you usually go first to search for information



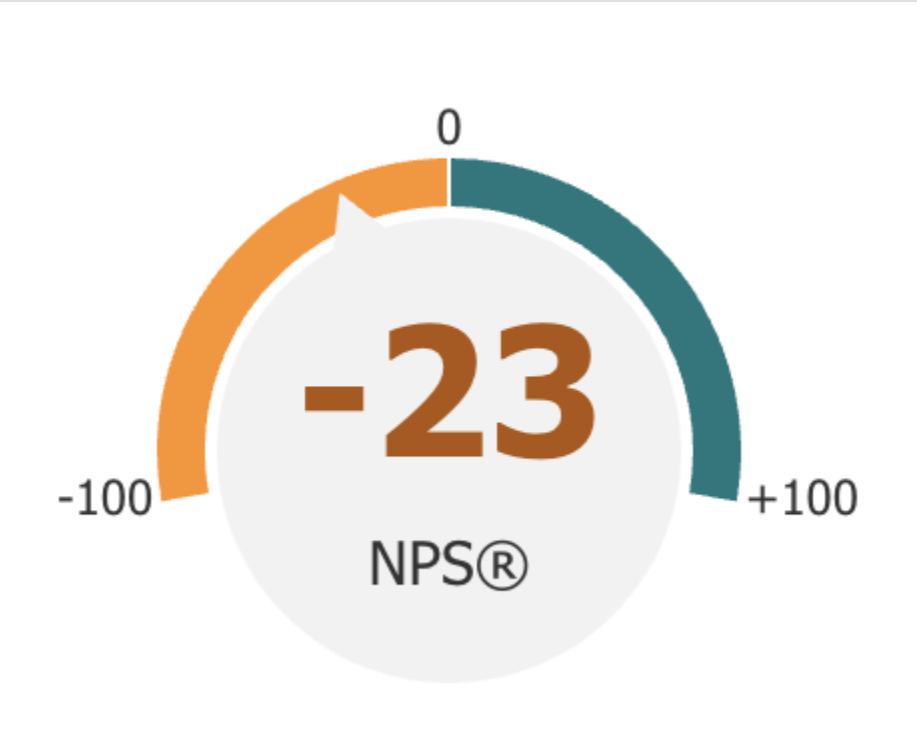
# How often do you find the information you need?



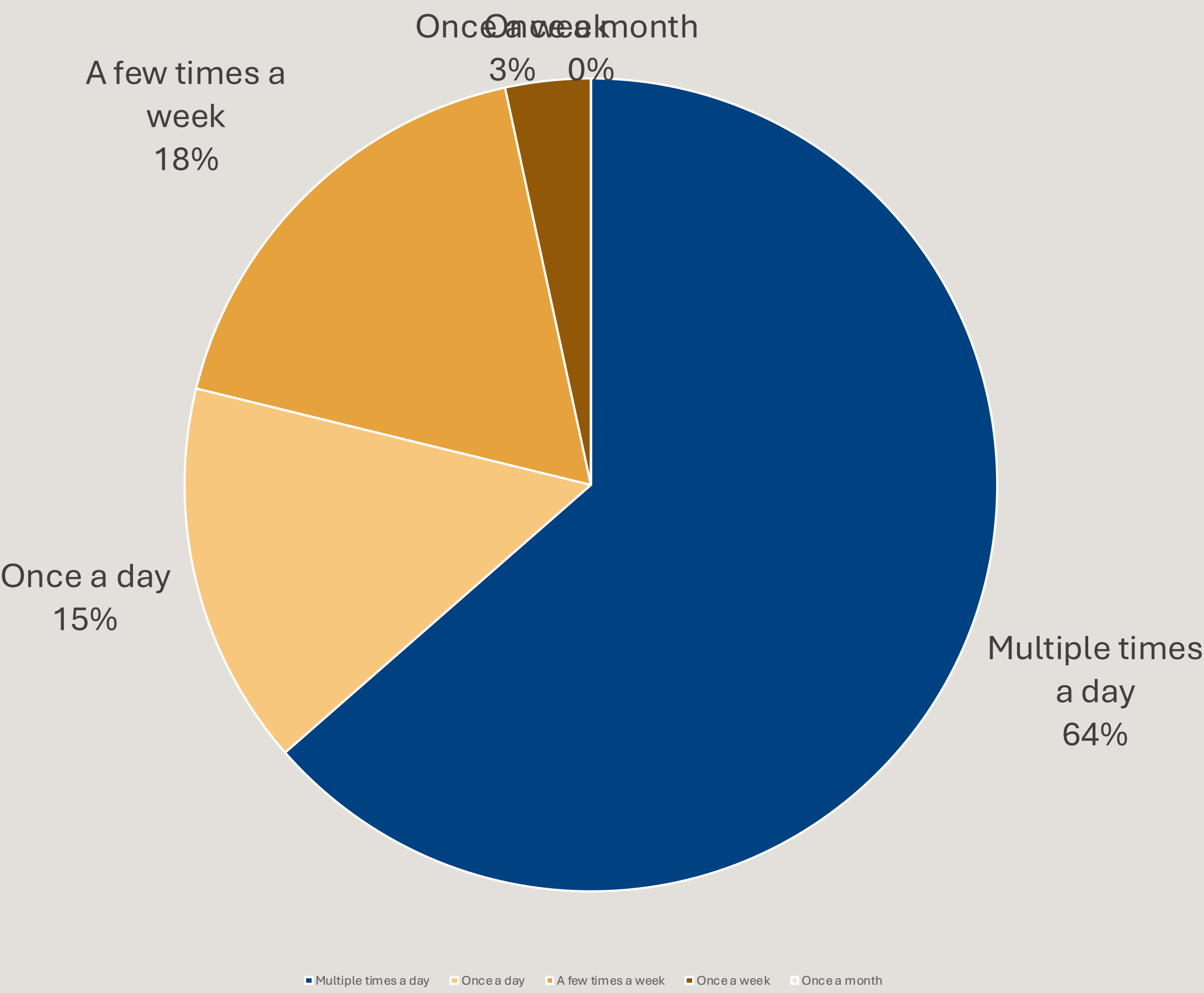
# How relevant is the information you find meets your needs?

NPS (Net Promoter Score) measures customer perception.

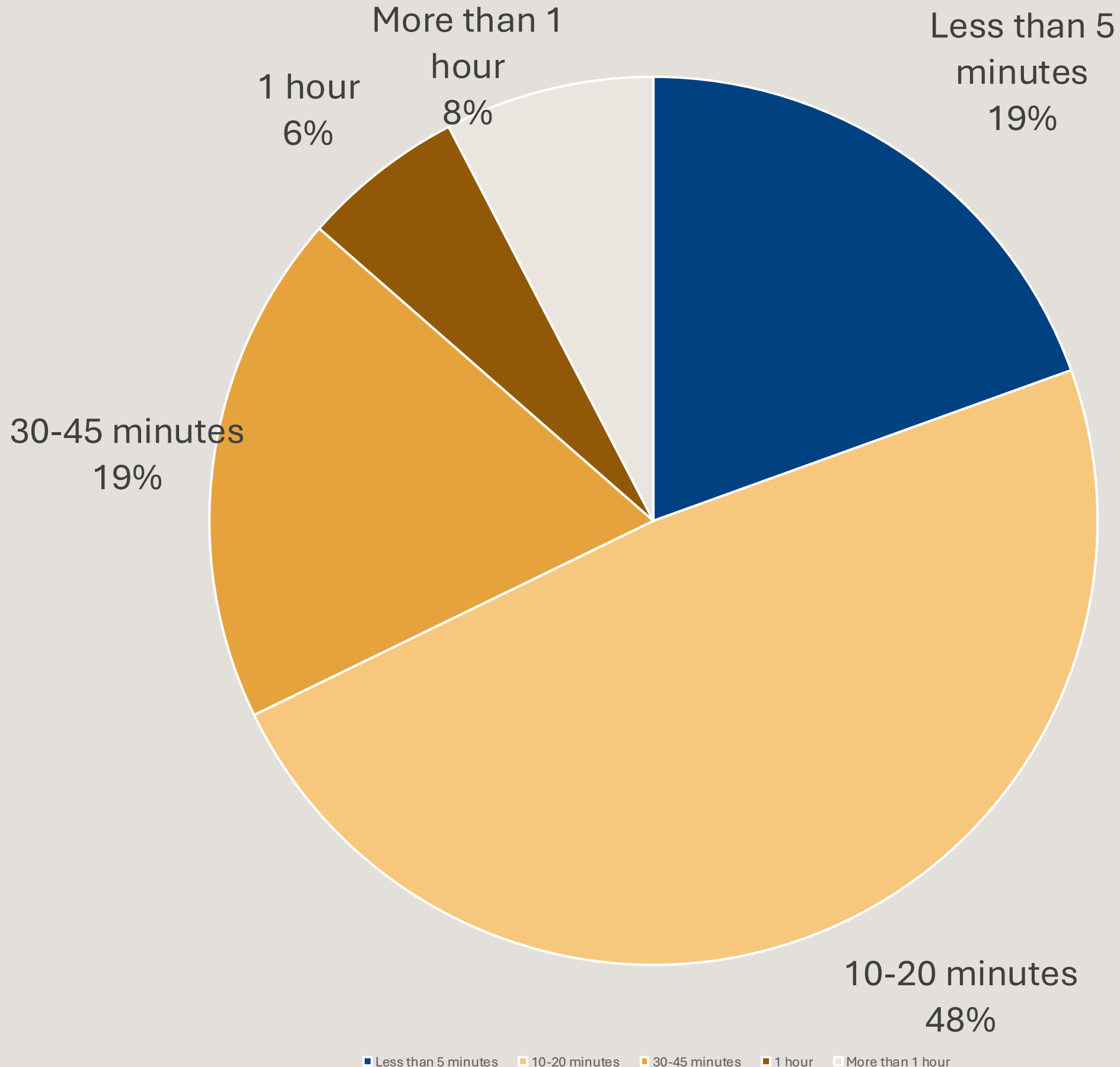
- **Promoters** respond with a score of 9 or 10 and are typically loyal and enthusiastic customers.
- **Passives** respond with a score of 7 or 8. They are satisfied with your service but not happy enough to be considered promoters.
- **Detractors** respond with a score of 0 to 6. These are unhappy customers who are unlikely to buy from you again, and may even discourage others from buying from you.



# How often do you need to search for information?

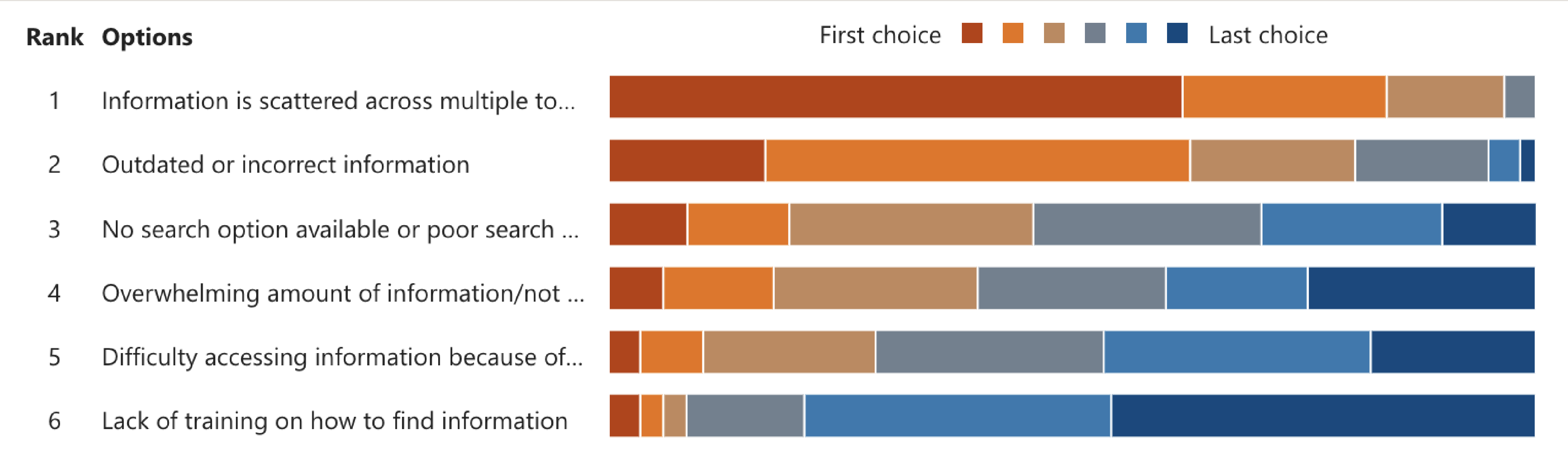


# Estimate how long it typically takes for you to find what you need:

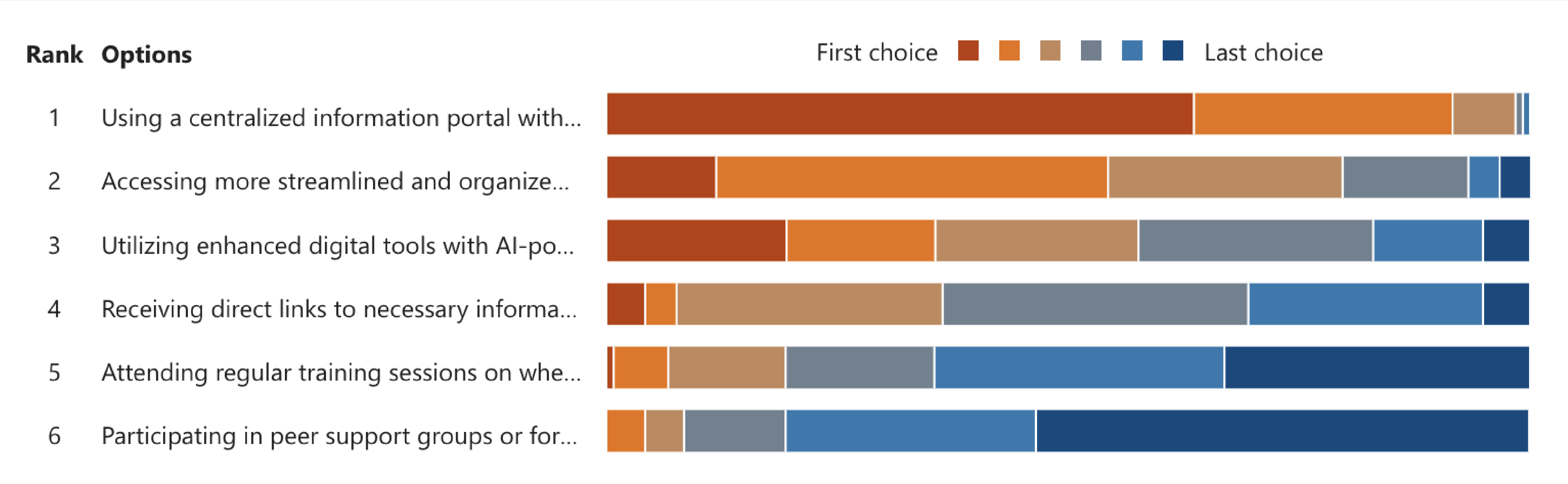




# Rank the following challenges you face when searching for information



# Rank the following ways you would prefer to find information for your work



Thank you