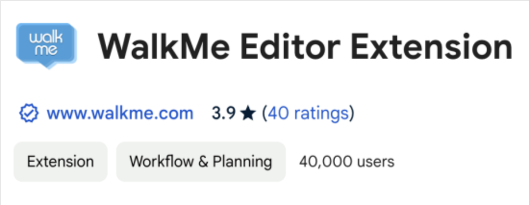
DAP WalkMe Setup

A few steps to get started.

1.Account Setup	Invitation email sent by WalkMe Admin	
2.Download & Install WalkMe Editor Application	https://www.walkme.com/download/	
3.Install WalkMe Editor Chrome Extension	https://chromewebstore.google.com/detail/walkme-editor-extension/pcpkdgfdckgllmimpichjagbpejchgnf	
4.Launch & Login to WalkMe Editor Application		
5.Login to WalkMe Support Site and review introduction to WalkMe Editor App	https://support.walkme.com/knowledge-base/editor-connection-indicator/	
Workshop Video	[TE WalkMe] Access and Workspace Setup (Optional)-20241108_090154-Meeting Recording.mp4	[TE WalkMe] Access and Workspace Setup (Optional) - HOW TO.docx

DAP WalkMe Playbook Resources

Quick access to important resources when creating WalkMe solutions.

🔗 DAT WalkMe Playbook		
1.Before Development	2.Stakeholder Alignment	3.Design and Development
• Level of Effort Evaluation • Pre-Solution Checklist • TE Roles & Responsibilties	• Top 3 Scenario Build Demos • Solution Menu • Solution Samples (Build Demos) • Streamlined Solution Mockups (Figma)	• Asset Naming Tool • Graphics & Illustrations (Figma) • Solution Mockup Template (Figma) • Solution Storyboard Template
4. 🔗 Data & Metrics (WalkMe Console)	https://support.walkme.com/knowledge-base/walkme-console/	
5. 🔗 Project ROI Calculator	Optional	

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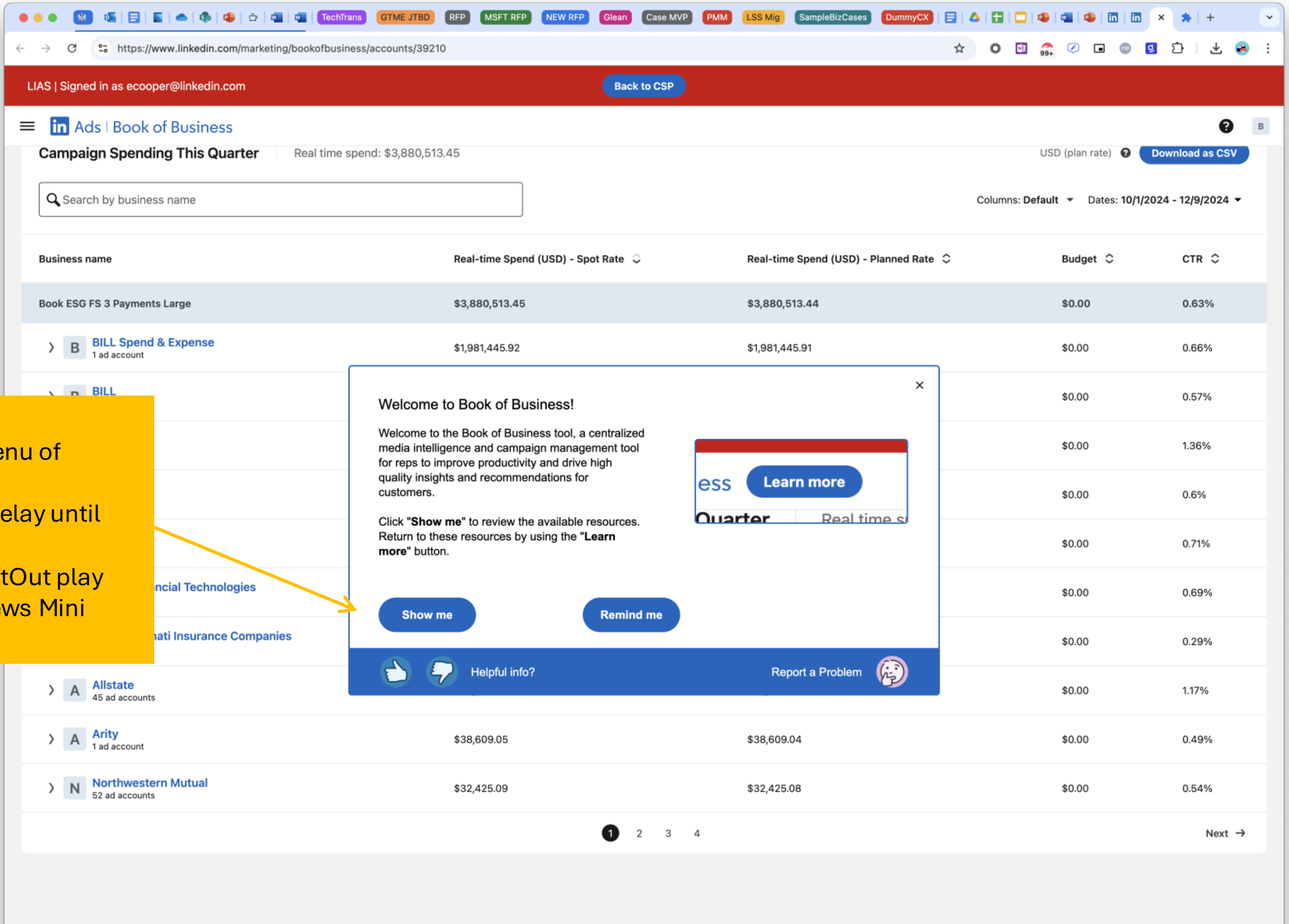
DAP WalkMe Playbook

Top 3 Scenarios when to use WalkMe

Category	Awareness	Hints	Adoption Campaign
Effort	Low (1-3 days)	Medium (3-5 days)	High (5+ days)
Scenario	Ensure that sales reps are well-informed about new features/policies, can quickly understand and use them, and seamlessly integrate them into their existing workflows to enhance their sales processes.	Ensure that sales reps can accurately and efficiently complete customer information forms, reducing errors and improving data quality.	Ensure that sales reps can smoothly transition to the new CRM system, maintain their productivity, and fully utilize the new system's capabilities to enhance their sales processes.
Solution Components	• Announcements of new capabilities and updates to existing policies. • Ongoing in-system support and reminders about newly launched capabilities.	• 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.	• 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.
Solution Live Runtime	• 2-4 weeks	• 4 weeks	• 60-90 days
Build Demo (10min videos)	WM BUILD Awareness - ShoutOut.mp4	WM BUILD Hints - SmartTips.mp4	WM BUILD Adoption Campaign - Mini Onboarding.mp4
WalkMe Assets Used	ShoutOuts Shuttles Resources	SmartTips Shuttles Resources	ShoutOuts Launchers Smart Walkthrus Shuttles Resources
HOW TO DOC	[TE WalkMe] Awareness Session – HOW TO.docx	[TE WalkMe] Hints Session – RULES - HOW TO.docx [TE WalkMe] Hints Session – SMARTTIPS - HOW TO.docx	[TE WalkMe] Adoption Campaign Session - HOW TO.docx
HOW TO VIDEO	[TE WalkMe] Awareness Session-20241114_130219-Meeting Recording.mp4	[TE WalkMe] Hints Session-20241118_100235-Meeting Recording.mp4	[TE WalkMe] Adoption Campaign Session-20241209_090327-Meeting Recording.mp4
User Segmentation	HOW-TO DOC [TE WalkMe] User Segmentation Session – HOW TO	HOW-TO VIDEO [TE WalkMe] CSV User Segementation Session-20241217_132953-Meeting Recording.mp4	

DAP WalkMe Playbook – Adoption Campaigns cont.

1.Introduce feature, system, initiative via ShoutOut



Action Buttons:

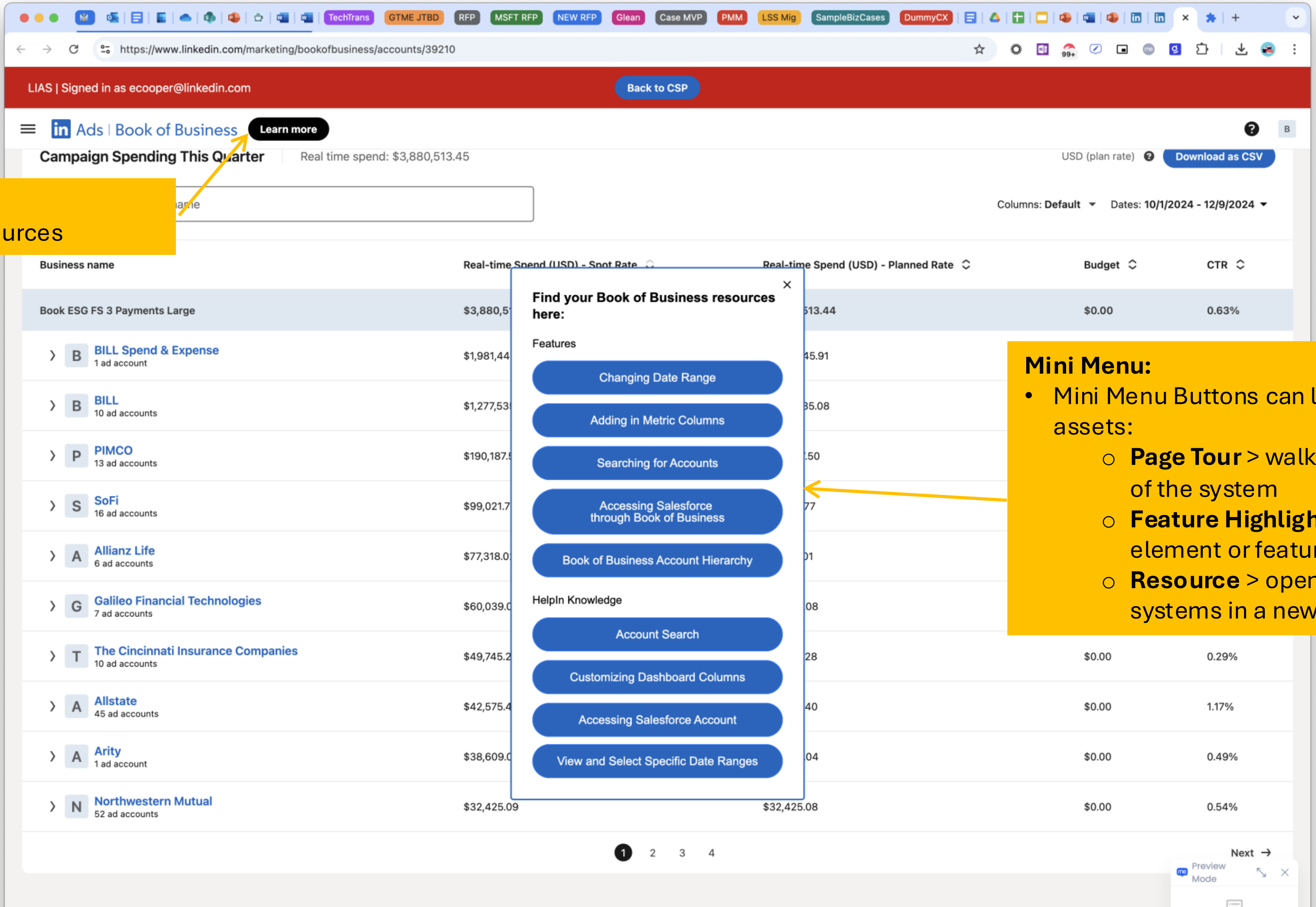
- "Show Me" > open Mini Menu of Resources
- "Remind me" > user can delay until next day
- *Best Practice: have ShoutOut play once a day until user reviews Mini Menu

DAP WalkMe Playbook – Adoption Campaigns cont.

2.Have a mini menu of Resources available for self-serve

Launcher:

- Opens Mini Menu of Resources



Mini Menu:

- Mini Menu Buttons can launch other WalkMe assets:
  - **Page Tour** > walkthrough multiple areas of the system
  - **Feature Highlight** > highlight one UI element or feature
  - **Resource** > open resources from other systems in a new tab

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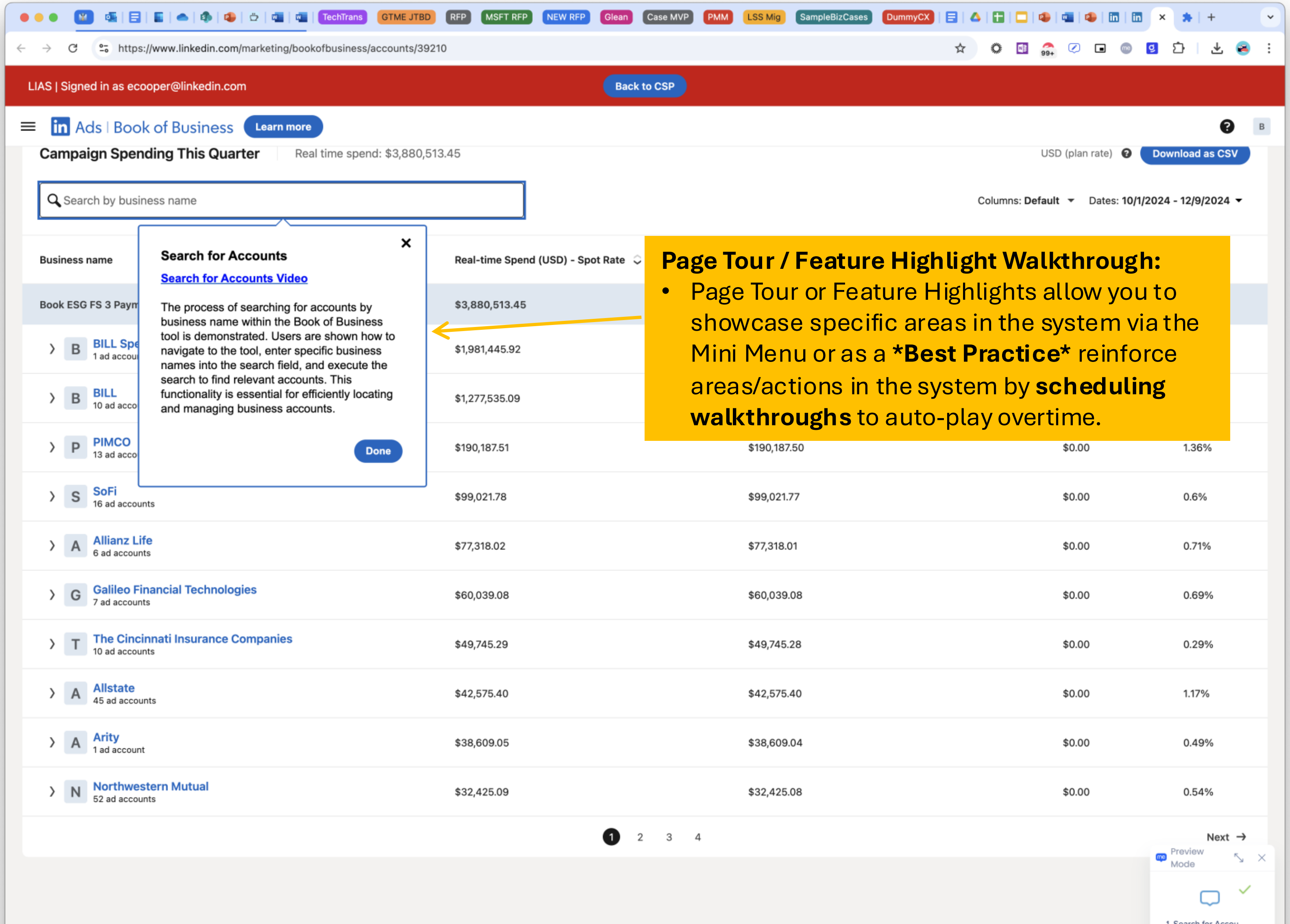
DAP WalkMe Playbook – Adoption Campaigns cont.

3.Schedule Walk-Thrus to auto-play in addition to having them available in Mini Menu



Page Tour / Feature Highlight Walkthrough:

- Page Tour or Feature Highlights allow you to showcase specific areas in the system via the Mini Menu or as a ***Best Practice*** reinforce areas/actions in the system by **scheduling walkthroughs** to auto-play overtime.

DAP WalkMe Playbook

PENDING LT APPROVAL

[Roles & Responsibilities](#)

Digital Adoption

DA LC

- Design and develop
    - Use WM Playbook, Storyboard, and Templates to showcase and build WM solutions [Hints & Adoption Campaign] to stakeholders.
    - Provide copyediting suggestions to stakeholders and CM about content clarity, length, and actionability.
- Troubleshoot
    - Review and publish CM ShoutOut [Awareness] creation. Submit tickets and work with WM support.
    - Ensure WalkMe is active for system, if first time using system – reach out to TechTransform.
- Deploy (Publish)
    - Publish WM solution to PROD.
- Monitor
    - Provide CM with WM asset IDs, ensure WM solution is archived after recommended lifecycle passes.

Change Management

CM PM

- Design and develop
    - Follow best practices and templates in WM Playbook to create one-time communication ShoutOuts [Awareness] (Banners, Small, Big).
    - Hand-off ShoutOuts for DA LC review and publish.
    - Draft and review content with stakeholder for WM solution. Partner with DA LC for copyediting.

Escalation Support

DA LC Owns -
Troubleshooting and build support

1. Submit ticket to WM Community and Support site (https://community.walkme.com/s/contactsupport) . [redacted]
2. If URGENT, submit ticket AND send email to [redacted]

DAP WalkMe Playbook

General Tips & Tricks

Category	Description	Why use it	Resource(s)
Stakeholder Expectations	Setting the appropriate stakeholder expectations when suggesting a WalkMe solution is critical. System issues, walkme outage issues, walkme extension install issues, environment (test v prod)	WalkMe can be an unknown variable for your project. There are many different types of issues that potentially delay or terminate creating a solution. Potential issues: • WalkMe limitations with specific systems, WalkMe outage, WalkMe extension updates/installation, WalkMe not active on system • Differences between Test and Prod environment • TE system access	Use these questions to gather all necessary information to make the decision if WalkMe is the right solution: GTME TE DAP WalkMe Playbook.docx
URL "Like" Rule	The "Like" condition for URL in the Rule Engine allow for fuzzy style URLs.	The "Like" condition allows us to string together pieces of a URL using *	https://support.walkme.com/knowledge-base/rule-engine/
Content URL Wrap it with 'Resource' or 'Shuttle'	WalkMe Shuttles and Resources allow for redirect to other URLs or to show information outside of the current system, in-system.	Shuttles and Resources can help us track if users have clicked or viewed specific content. Also, if a URL needs to change and it is linked in multiple other assets like a ShoutOut – you only need to change the URL once in the Shuttle or Resource.	• https://support.walkme.com/knowledge-base/shuttles/ • https://support.walkme.com/knowledge-base/resources/
Digital Adoption Best Practices	General Best Practices • Define Clear Objectives: Ensure there is a clear objective for user behavior or awareness. This helps users understand the purpose and benefits of the new system or feature. • Keep Messaging Concise: UX writing and messaging should be short and sweet. Clear and concise instructions help users quickly grasp the information without feeling overwhelmed. • Utilize External Resources: Not all information should be included in the WalkMe solution. Sometimes, external resources are needed to complete the solution, providing users with comprehensive support and guidance.	It helps keep your WalkMe solution targeted, simple, and results oriented.	If you're unfamiliar with Digital Adoption and its principals, here is a quick take: GTME TE DAP WalkMe Playbook.docx