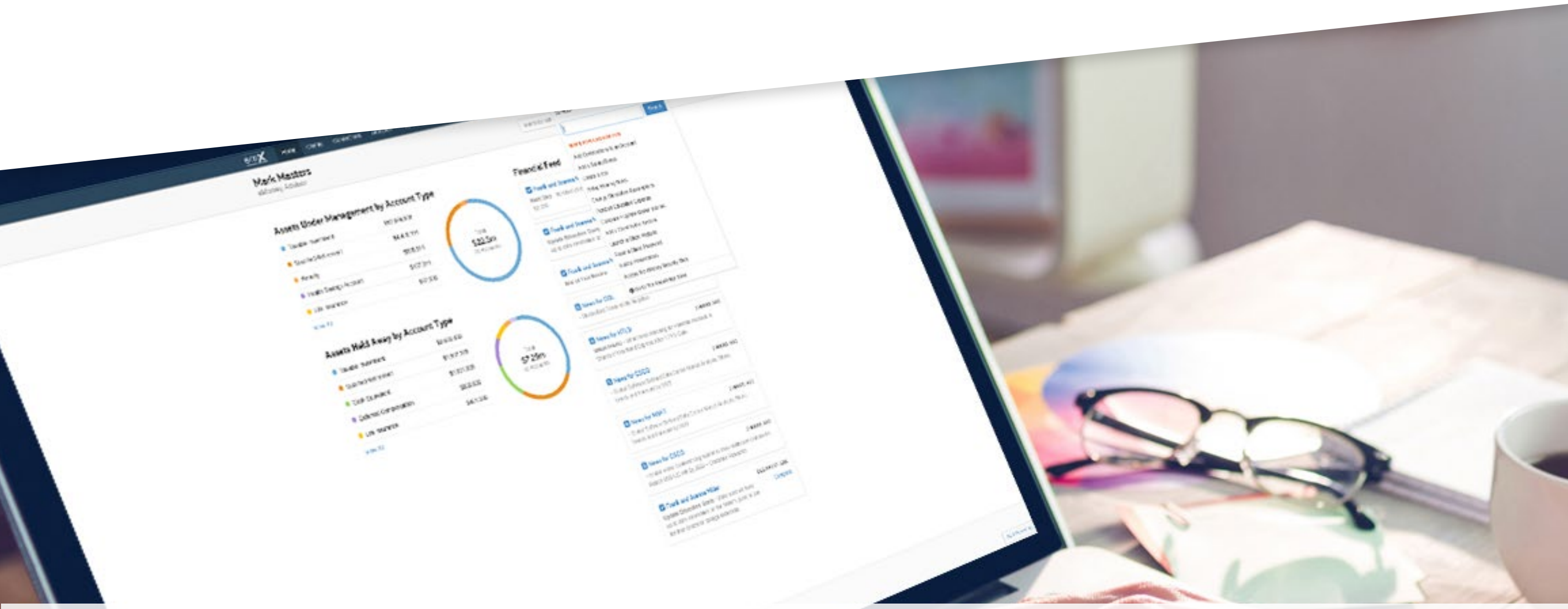

# eMoney Advisor

Case Study

**Streamlined User Adoption**

## The Company

eMoney Advisor creates scalable wealth management technology that transforms the way financial professionals deliver advice and build collaborative relationships with their clients. Today, eMoney aggregates more than $1.4 trillion dollars in assets for more than 45,000 financial professionals, serving 2 million end-clients.

> *WalkMe has helped eMoney scale and streamline user adoption and share critical messages with target audiences. We were able to create customized courses that save time, eliminate tedious work and produce meaningful and strategic conversations, enabling our customers to get the most out of our software, service and support.*
>
> *Steve Levis, SVP, Client Engagement, eMoney Advisor*

## The Challenge

eMoney's challenge with onboarding stemmed from a need for a comprehensive virtual learning experience for their end users. This void resulted in high call volumes, as appointments with Customer Success Coaches turned into training sessions on how to use the software, as opposed to being focused on best practice strategies and how to efficiently and effectively succeed with the eMoney Platform.

eMoney required a training platform which was easy to navigate, could live as an overlay on the eMoney application, could provide gamification, and had the capability to generate business insights that revealed exactly how users were completing training modules. eMoney needed a way to eliminate tedious point-and-click training and shift client sessions with Success Coaches away from administrative tasks to meaningful and strategic conversations.

## The Solution

WalkMe is now an integral part of eMoney's strategy to make user adoption efficient yet effortless. eMoney created an external LMS utilizing WalkMe's TeachMe Application that now lives in the Help menu. This comprehensive virtual onboarding guide is comprised of video, PDF, and Walk-Thru Flows designed to engage and interact with end users during training.

With the help of WalkMe's team, eMoney created 10 different courses in TeachMe that mimic the training process that users would typically go through with their Success Coach. They also added a Search functionality to the Help menu, allowing users to easily identify and access all of eMoney's resources in one widget. By utilizing TeachMe, eMoney has created an entire program with 80+ self-guided Walk-Thru's and over 200 resources for bringing new users up to speed quickly and at scale.

eMoney is not designed to be a one-size fits all financial planning solution and the company prides itself on offering their users a personalized customer experience. With WalkMe, eMoney is able to offer customized coursework within TeachMe, that users complete independently. This program allows customers to concentrate on strategy when they meet with their Success Coach, and focus on applying these lessons to their business in real-time.

**"Real Time Step-by-Step Learning"**

## The Benefits

Six months after launching the WalkMe platform, eMoney found an increase in engagement for both their clients and their clients' clients (end-users). In fact, eMoney clients who used WalkMe had nearly double the number of end-users up and running on the eMoney platform compared to those who did not complete WalkMe coursework. Clients are clearly motivated to learn the basics from WalkMe and as a result, eMoney's Success Coaching sessions with clients have become more meaningful. With WalkMe's help, eMoney is able to scale and personalize training across groups of advisors with very different needs. eMoney's client onboarding program is now seamless and efficient, further empowering clients and end users to get the most of eMoney's technology.