



DEPLOYMENT GUIDE:

Digital Adoption Platforms

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In This Guide

Readers will be introduced to four WalkMe client case studies and how they deployed digital adoption platforms (DAPs) for employees and customers. Deployments include employee experience (EX) efforts to engage and upskill employees and customer experience (CX) initiatives to encourage customers to adopt products and features.

For organizations NEW to DAP deployments:

The guide shares best practices for initial DAP deployments internally with employees or externally with clients. It speaks at a high level about key business, organizational, and general technical requirements to successfully launch DAP technologies.

For organizations EXPANDING their DAP deployments:

The guide offers best practices from organizations in different industries that have successfully grown DAP deployments across multiple applications, geographies, and use cases. [Phase 2](#) covers proper communication, organizational resource management, and financial support for DAP expansion. [Phase 3](#) offers ideas for future DAP expansion internally and externally.

Summary of Key Recommendations

This guide takes a phased approach to explain strategic priorities and initial planning in Phase 1. Phase 2 and 3 expand deployments and evaluate opportunities for future DAP initiatives.

Click buttons below to navigate to each phase.

PHASE 1

- Confirm core business challenges for employees and/or customers.
- Determine which key functions will be engaged.
- Identify key stakeholders and executive sponsors.
- Establish core DAP team and skills requirements.
- Address core governance, compliance, and security requirements.

PHASE 2

- Assess and reevaluate business challenges.
- Identify next best opportunities to expand DAP based on business value.
- Determine requirements for team expansion and upskilling.
- Validate core tracking and performance measurements.

PHASE 3

- Secure an enterprise license agreement.
- Refine existing deployments.
- Expand internationally.
- Add an internal employee experience (EX) or external customer experience (CX) deployment.

INTRODUCTION

Why Digital Adoption Platforms Matter Now

CLICK BELOW TO NAVIGATE

- **What's Changing in the Market: Current and Predicted Business Climate**
- **Why Act Now: Common Challenges and Requirements**
- **Defining Digital Adoption Platforms**
- **How to Act Strategically: The Value of Digital Adoption Platforms**
- **Digital Adoption Platform Case Studies**

What's Changing in the Market: Current and Predicted Business Climate

The business disruptions of 2020 forced organizations to shore up eclectic and distributed IT stacks, adopt greater process automation, enable employees to automate their own work, and reassess workplace learning. Unlike the recession of 2008, technology investment did not decline with GDP; many organizations spent heavily on digital transformation (DX).

These organizations are accelerating cloud migration to support remote and hybrid work models and digital-first client engagement. They continue to invest in collaboration and virtualization technologies and have accelerated initiatives to consolidate

applications on a common customer relationship management (CRM) or enterprise resource planning (ERP) system. Digital adoption platforms offer clear data on which applications deliver business value, which are used most effectively, and how employees and customers work with different applications.

One of the biggest lessons of the current era of digital disruption is increased workflow automation must be paired with business analytics to improve business processes and digital learning.

DX spending is expected to grow to \$2.4 trillion by 2024, growing at a CAGR of 15%.

Source: IDC's *Worldwide Digital Transformation Spending Guide, 2021*

Why Act Now: Common Challenges and Requirements

Organizations must focus on digital transformation to rapidly respond to current business disruptions and adapt using digital capabilities. According to IDC's *The C-Suite Tech Agenda for 2021*, the top priority is to optimize business processes and workflows. As smaller organizations grow and require deeper insight into ERP, fragmented management tools no longer offer sufficiently detailed or integrated analytics.

Companies need cloud-based, sophisticated tools to analyze employee and customer experience. The working models of 2020 and 2021 have driven demand for new collaboration capabilities, digital workspace platforms, and myriad tools to enable more frictionless work experiences across all industries.

“We’ve shifted away from legacy silos to a lot more agile way of working and cross-functional teamwork.”

LEARNING PROGRAM OWNER, ACCOUNTING AND PAYMENT SYSTEMS COMPANY

Defining Digital Adoption Platforms

Digital adoption platforms are no-code platforms that sit on top of any application to derive the underlying value of the application.

DAPs enable organizations to:

- Monitor performance of products or tech stacks to gain business insights
- Deliver consistent experiences across multiple applications
- Optimize business processes and workflows
- Realize cost savings and revenue growth

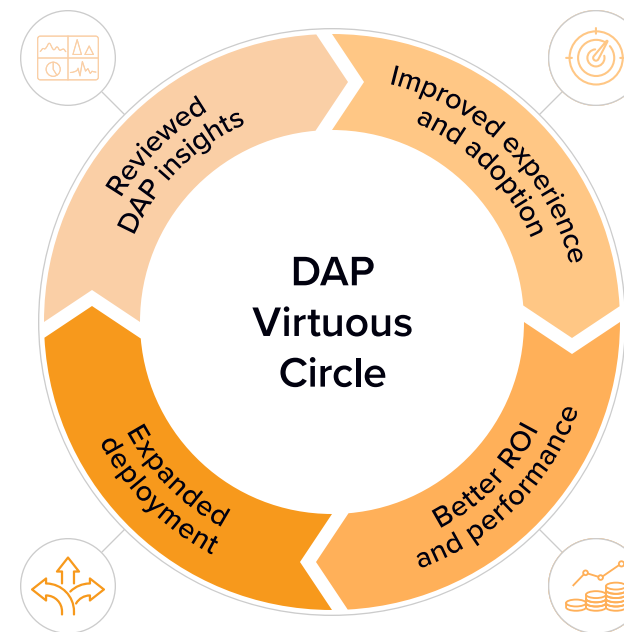
DAP FEATURES INCLUDE:

- Global user engagement analytics
- Secure analytics across apps/systems
- Codeless platform experience
- Workflow automation
- Personalized user experiences
- In-app guidance and engagement for proprietary products or third-party software
- Governance and security guidelines
- Self-sustaining process improvements

How to Act Strategically: The Value of Digital Adoption Platforms

Determine the most effective starting point:

- Which applications are being used and why?
- How many active or potentially active users does each application have?
- What is the frequency of application use and type of usage?
- How long does it take to onboard users?
- What are the language support requirements?
- What's our visibility into application performance?
- What's working and where are users challenged?
- Is the organization gaining the intended benefits from our technology?
- Do we have wasted expenses on software licensing, training, or support?



DAP deployments speed proficiency on software platforms, websites, or apps to meet the growing need for rapid technology adoption. Insights extend well beyond the employee or customer experience itself to broader analytics that can drive cost savings, streamlined processes, and revenue growth.

DAP CASE STUDY #1

DEPLOYMENT TYPE:

Employee Experience (moving to customer experience)

BUSINESS CHALLENGE:

Transformation of performance management process and ERP, consolidation of 40+ apps into a single platform

KEY OUTCOMES:

Supporting ERP and performance management apps with plans to expand globally and to external users

SPONSOR ORGANIZATION LEAD:

Learning and development, with CFO sponsorship

DAP LEAD:

Head of Talent Technology

A health organization grows Digital Adoption Platform deployment from 4 to 45+ applications, educating 3,000 employees.

An international not-for-profit health system planned an ERP implementation to consolidate more than 40 different applications onto a single platform. As new applications were added, the organization needed to educate its 3,000-person workforce. DAP implementation began with the performance management process. With CFO sponsorship, the head of talent technology led a small team to deploy WalkMe across four applications.

To move from a small-scale phase 1 to full phase 2 enterprise DAP deployment, the team involved C-suite leaders to fully vet and support the rollout. The team engaged WalkMe to support the expansion and built a center of excellence (COE) with people from change management, communications, IT, and HR, adding other stakeholders as needed.

The organization also made a point to brand its WalkMe experience with a user-friendly mascot to drive greater adoption and feedback. In phase 3, the organization plans to expand internally by focusing on the candidate experience and externally by implementing DAP support for the patient experience. The organization also hopes to expand globally to include operations in Chile, Mexico, and Colombia.

DAP CASE STUDY #2

DEPLOYMENT TYPE:

Customer experience

BUSINESS CHALLENGE:

Improving application engagement and conversion for trial users and current clients

KEY OUTCOMES:

Improved client adoption and streamlined DAP adoption into product releases

SPONSOR ORGANIZATION LEAD:

Services for digital growth

DAP LEAD:

Product manager, senior strategy consultant

A Fortune 100 tech firm improves customer Net Promoter Scores as it builds DAP-guided customer experience across cloud products.

This global IT and services provider wanted to improve overall application engagement for trial users and current clients. After initiating proof-of-concept deployments with multiple alternative DAP providers across one or two applications, the company selected WalkMe for all customer-facing software offerings, using either the cloud-hosted snippet for a typical cloud offering or the on-premises snippet.

The deployment went through a three-phase process beginning with the initial evaluation which generated significant demand. For the first six months, a full-time WalkMe consultant supported deployments and cross-organizational training. The look and feel of WalkMe was fully configured to meet corporate branding standards to seamlessly integrate into the product experience.

In phase 2, the deployment team focused on outreach to internal teams as part of the product planning process. Currently in phase 3, success stories were promoted to prompt trial users to become subscribers. WalkMe is now deployed across 40 products or applications with a plan to support hundreds more.

DAP CASE STUDY #3

DEPLOYMENT TYPE:

Employee experience

BUSINESS CHALLENGE:

Rapid global business growth through consolidation on common CRM and standardized apps, as required by an acquisition

KEY OUTCOMES:

Streamlined business operations with standardized DAP deployment on Salesforce and 15 additional applications

SPONSOR ORGANIZATION LEAD:

Business operations

DAP LEAD:

Learning program owner

An accounting and payment systems company securely deploys 16 multiregional, multifunctional apps and plans further Digital Adoption Platform expansion.

An accounting and payment systems company, growing quickly through acquisitions, wanted to shift to a more centralized, globally integrated model with standardized applications, CRM systems, and ways of working. To ensure universal adoption across diverse departments and geographies, the company piloted WalkMe with a low-risk finance application. From there the company expanded to the operations team before adding a second, critical financial application and expanding to a multiregional Salesforce CRM system with 1,500 users.

The team used an iterative approach to update and adapt content and practices. In phase 2, the team grew WalkMe deployment to 16 applications, including ones for onboarding, training, and vacation tracking. To strengthen security and privacy, the company created anonymized “Me IDs” that track user experiences without violating confidentiality. With 16 applications deployed, this organization is considering an ELA in phase 3 and plans to accelerate their DAP deployment to more applications and functions.

DAP CASE STUDY #4

DEPLOYMENT TYPE:

Employee experience moving to customer experience

BUSINESS CHALLENGE:

Migrating 60% of employees from custom CRM to Microsoft Dynamics

KEY OUTCOMES:

Improved operational efficiency and standardized workflows and user experiences across internal applications

SPONSOR ORGANIZATION LEAD:

Sales

DAP LEAD:

Head of digital adoption

A cloud computing platform company expanded its deployment from 600 to 15K users in one year.

A cloud computing platform company needed to transition from a homegrown CRM system to Microsoft Dynamics. It began its WalkMe deployment with sales, hiring a head of digital adoption to manage the process. Having led successful DAP deployments in the past, he quickly convinced the organization to expand from a single application to a broad portfolio of apps across finance, HR, and other functions.

Phase 1 built a strong business case for DAP use to senior management, addressing IT concerns about security and privacy, and creating a three-person team to grow from one to seven systems. Phase 2 added two members to extend deployment across 15 applications, established standardized operating processes, and positioned the DAP team as its own internal business to support growth for each function and department. Phase 3 matured current processes and ensured companywide usage. Phase 4 will segue externally to offering a DAP to clients to highlight product functionality and drive sales.

PHASE 1

Laying the Groundwork to Assess Digital Adoption Platform Opportunities

CLICK BELOW TO NAVIGATE

- **Core Business Challenges**
- **Digital Adoption Platforms Deployment Plan**
- **Secure the Right People and Processes**
- **Governance**
- **Compliance and Security**

Core Business Challenges

Although many organizations start their DAP deployments with a single application, it's important to assess the broader business challenges that hinder long-term digital resiliency. Targeting the most pressing EX and CX difficulties (and their connection points) will expose which applications are highest priority, which apps are being used, where users are challenged, or where customers drop off.

Here are some common situations:

EMPLOYEE

- Migrating to systems (CRM or ERP)
- Consolidating on standard core applications
- Supporting new processes and application adoption
- Remote onboarding for new employees
- Upskilling and cross-skilling for productivity

CUSTOMER

- Converting trial clients to paying customers
- Improving usage for current customers
- Improving time-to-value for current customers
- Expanding portfolio adoption across products (cross/upsell)
- Improving customer support experience

MANAGEMENT

- Gaining visibility into the performance and ROI of entire tech stack

PHASE 1: Laying the Groundwork to Assess Digital Adoption Platform Opportunities

Core Business Challenges continued

Many organizations are consolidating on a common set of applications for cost savings and better integrated analytics, while market conditions have exposed internal and external inefficiencies in supporting employee productivity and engaging customers. Recent IDC research has shown that only 14% of organizations are very prepared to support employees as they onboard, upskill, and/or reskill to meet changing business needs.

Skills gaps have real business consequences. According to a 2021 IDC *Future Enterprise and Resiliency* survey, lack of skills has delayed DX journeys an average of 35 weeks worldwide (25 weeks in the United States, 45 weeks in Asia/Pacific, 30 weeks in Europe, the Middle East, and Africa).

Source: IDC's *Future Enterprise Resiliency and Spending Survey*, Wave 3, April 2021; n = 741



KEY QUESTIONS TO TRIAGE DAP DEPLOYMENT:

- ▶ Do critical business challenges come from EX app deployment, CX, or both?
- ▶ Which EX applications are best targets for a DAP and are most critical to the business?
- ▶ How can DAPs improve customer app usage?
- ▶ What are the skills requirements to meet business goals?

Digital Adoption Platforms Deployment Plan

With key business challenges identified, focus on priorities and communication. New models of work and client engagement require cross-functional leadership support. Consider the business case of the DAP deployment and what concerns may arise from cost/benefit analysis.

It's not uncommon to have organizational interdependencies with DAP deployment, for example understanding how a DAP will complement existing learning and development programs. IDC recommends a brief trial deployment to start running analytics early, as well as identifying all organizational and technical dependencies. This also offers an opportunity to review internal analytics to document ROI and user value.

All organizations deploying DAPs must consider how the process will be governed, either via a centralized center of excellence or a more distributed fashion. Finally, establish regular reviews of deployment updates, applications, and user feedback and metrics.



KEY QUESTIONS FOR DAP PLANNING:

- ▶ Which key functions will be engaged and how?
- ▶ Do we have the right stakeholders and resources to execute?
- ▶ How will we know if we are succeeding?
- ▶ What governance practices do we need?
- ▶ What will be the strategy to brand or not brand WalkMe?
- ▶ Where are the blockers and/or dependencies?
- ▶ How are we addressing security requirements?

Secure the Right People and Processes

Engage senior leaders early.

IDC has seen a significant shift to joint C-level decision making around IT deployments. DAP deployments can be a key element of digital transformation efforts. Think carefully about who will be engaged, from the most senior sponsors to the team responsible for executing day-to-day deployment, communication, and content creation.

Find the right support team and skills.

DAP deployments rely on a core team of a project manager and a designer/developer, both of whom collaborate with an application “owner” to develop content. The DAP team may come from Learning & Development (L&D), IT, or other areas. Expertise is needed in technology, user experience design, and learning materials creation. As the head of digital adoption for a cloud computing platform company noted, *“I started to build out a team of digital adoption experts who are now basically spread throughout our entire system landscape, and each one of them owns a set or series of systems.”*

SAMPLE DAP DEPLOYMENT TEAM

In addition to an executive sponsor who ensures broad organizational support and consistent financing, DAP deployment teams include:

Project manager

RESPONSIBILITY: Drive DAP strategy and adoption

SKILLS: Prototypes and manages DAP experience for leaders and creates success metrics

Builder

RESPONSIBILITY: Design and development of DAP content

SKILLS: Development, user interface/user experience, and learning expertise

Subject matter experts

RESPONSIBILITY: Provide frontline expertise on specific applications

SKILLS: Understands individual application and has technical acumen

PHASE 1: Laying the Groundwork to Assess Digital Adoption Platform Opportunities

Secure the Right People and Processes continued

Ensure the DAP team has support from WalkMe or a Certified Partner.

Consultants are invaluable if team leaders do not have prior experience with WalkMe. As deployments expand, organizations tend to offload more to their internal teams as they gain expertise.

Emphasize a data-driven approach.

Executives often have preconceived notions about the value or ease of use of “pet” applications. Use insights and analytics to understand where users are struggling and build this into each phase of deployment.

Scope project phases.

Be clear on milestones, success metrics, who will be engaged, and the clear end goal, whether employees or customers are initial users. See right for an example of how a Fortune 100 IT company deployed DAP with clients.

SAMPLE PHASED DEPLOYMENT PLAN (Customer Experience)

1. Ideation

GOAL: Identify successful user experiences and what to showcase

LEAD ROLES: Product designers, project managers, input from sales

2. Content execution

GOAL: Use ideation insights to build successful experiences

LEAD ROLES: Product designer, instructional designer, design researchers

3. Deployment to application

GOAL: Deploy code snippet or browser extension successfully as designed

LEAD ROLES: Product developer or IT lead

4. Monitoring

GOAL: Ensure live environment continues to run as expected

LEAD ROLES: DAP managers and builders, systems SMEs

Governance

Establish core governance requirements.

Many organizations have existing review boards to examine deployment procedures. Others onboard new software applications and platforms on an ad hoc basis. Either way, a DAP deployment should include ongoing reporting of metrics and alignment with essential or preexisting vendor agreements.

Consider agile and iterative governance practices.

Agile practices require a cadence of review cycles for predictable requirements. Retrospectives and regular scrum meetings showcase successful DAP implementations to drive employee and customer adoption. In addition, it's important to plan cross-functional performance reviews of DAP deployments and requirements with governance teams (including IT, legal, HR, and communications) to preemptively address concerns.



KEY QUESTIONS FOR GOOD DAP GOVERNANCE:

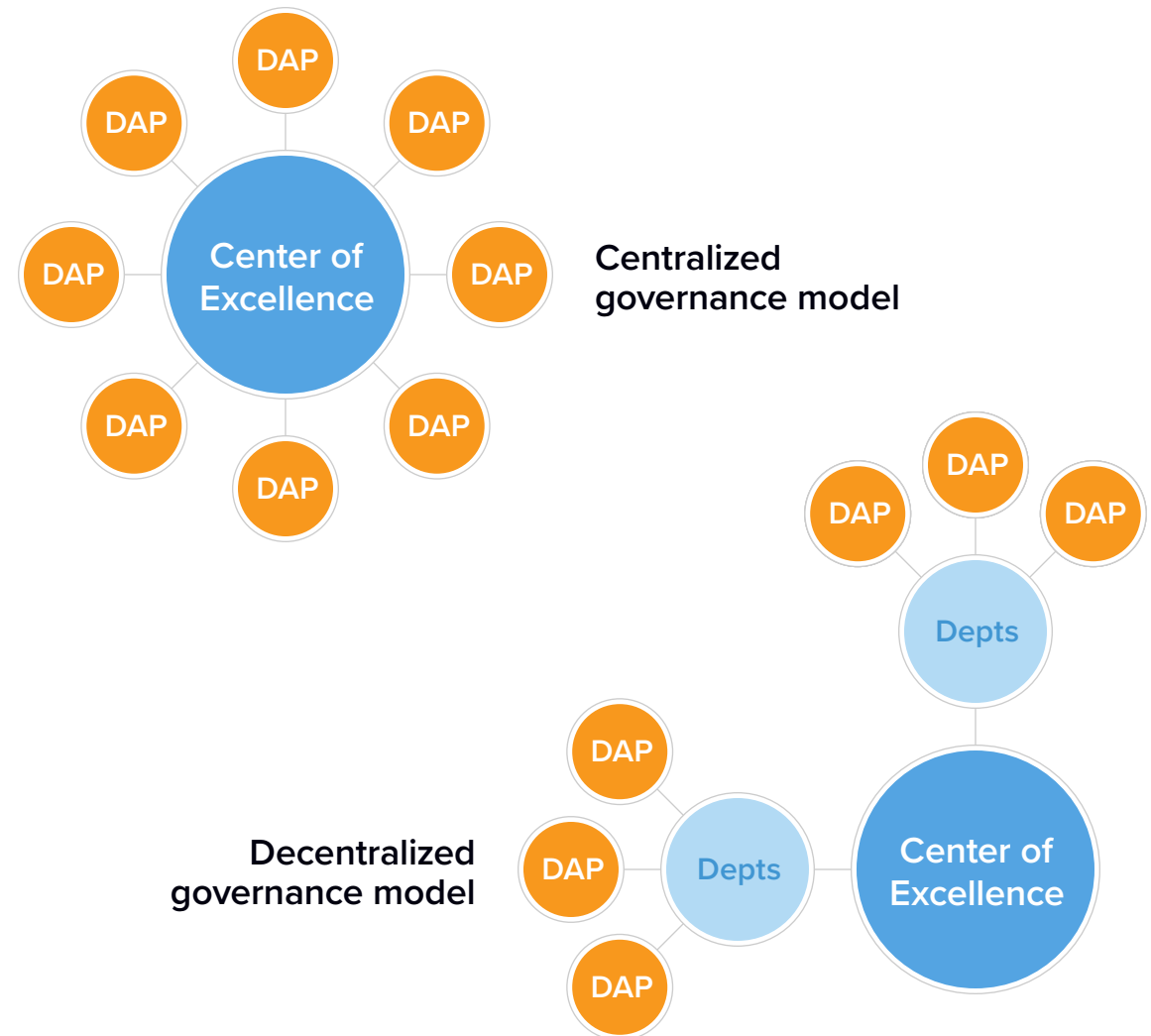
- ▶ Who is responsible (drivers)?
- ▶ Who is accountable?
- ▶ Who is consulted?
- ▶ Who is informed and how?
- ▶ How often will the team meet?
- ▶ How will the team handle objections and escalations?
- ▶ Who owns DAP insights and analytics?
- ▶ How do DAP data insights align with original business case?

PHASE 1: Laying the Groundwork to Assess Digital Adoption Platform Opportunities

Governance continued

Evaluate centralized versus decentralized governance models.

Governance can range from loosely organized department-level requirements to highly centralized annual or semiannual reviews. Many organizations work within broader corporate governance models or form a center of excellence (COE) to ensure a well-run cadence and consistent user experiences. For other organizations, this may not be needed or possible, so set expectations will be key. Organizations using a decentralized model should provide dedicated resources to respond quickly to DAP management requests.

**RECOMMENDATION:**

Schedule recurring performance reviews with full governance team to document progress, new best practices that can be replicated as well as user challenges and recommended investments.

Compliance and Security

Address security, privacy, and compliance requirements.

New European and North American legislation requires strict adherence to privacy. Determine what type of personal data will be captured and stored and how to balance industry (HIPAA) or regional (GDPR) compliance and personalized learning experiences. WalkMe may address or exceed security requirements, so engage both IT and legal teams to address security and compliance.

It may be necessary to decouple WalkMe's content capabilities from analytics capabilities. WalkMe should only be deployed where the

user has consented to the level of cookies that allow WalkMe to run. For CX applications, request documentation on where data will be hosted and how it's secured at rest and during transport.

Ensure that IT is aware of the data that WalkMe collects and analyzes to avoid unnecessary review cycles. Applying the most stringent anonymization settings will limit the number of WalkMe analytics available to optimize deployment value. An architectural review can verify there is no vulnerable code.

"I established biannual reviews with our security team because my team keeps rapidly expanding on all of the systems internally that we are implementing on WalkMe, going from one system to 32 systems."

HEAD OF DIGITAL ADOPTION, CLOUD COMPUTING PLATFORM COMPANY

PHASE 2

Building Out Core Deployment

CLICK BELOW TO NAVIGATE

- **Next Best Opportunities**
- **Initial Digital Adoption Platforms Deployment Assessment**
- **Performance Evaluation and Tracking**

Next Best Opportunities

DAP deployments may grow organically as improved user experience, speed to value, and cost savings become widely recognized.

Growth may come from:

Expanded business opportunity.

For the accounting and payment firm, growth started with financial applications and spread to an integrated CRM deployment to introduce DAP usage across different geographies. The large health organization's COE fielded requests from different departments and assessed the business case and ROI for specific applications.

“As WalkMe rolls out to other applications, my stakeholder population grows.”

DAP LEADER, GLOBAL HEALTH ORGANIZATION

Showing competitive advantage.

The cloud platform company's DAP team positioned itself as a premier internal service provider offering expertise on effective DAP deployments. Using success metrics from early adopters, the team made clear that DAP adoption offered a competitive advantage.

Growing product revenue and customer retention.

The Fortune 100 organization focused on using DAPs to support product adoption with clients and expand to new applications. Their success created a next generation of product owners eager to deploy DAPs to speed customer conversion and product sales.

Initial Digital Adoption Platforms Deployment Assessment

Review business challenges and analytics.

Evaluate if DAP analytics align to business concerns. What elements of DAP deployment are successful based on analytics and feedback? Are DAP deployments falling short in process, content, support resources, or IT concerns? Adjust deployment plans if new or higher priorities have surfaced.

Experiment with WalkMe software on multiple offerings.

Do pilot comparisons taking the time to try out the software on more of the offerings. Especially where there is a mix of software offerings where there may be different code (e.g., from mergers or acquisitions) running compatibility tests with different types of software to configure WalkMe is valuable since the same code may not be running everywhere.

Cross-check internal communication.

IT may have concerns about security and interoperability. L&D may think DAP encroaches on traditional learning programs. A clear cycle of communication with stakeholders and feedback channels can mitigate these concerns.

Confirm federated versus centralized governance models.

Evaluate whether governance processes are smoothing deployments before expanding. Assess which model would be most effective at speed and scale. If needed, consider a centralized COE to assess DAP opportunities across departments.

PHASE 2: Building Out Core Deployment

Initial Digital Adoption Platform Deployment Assessment continued

Gain consensus on branding and user experience.

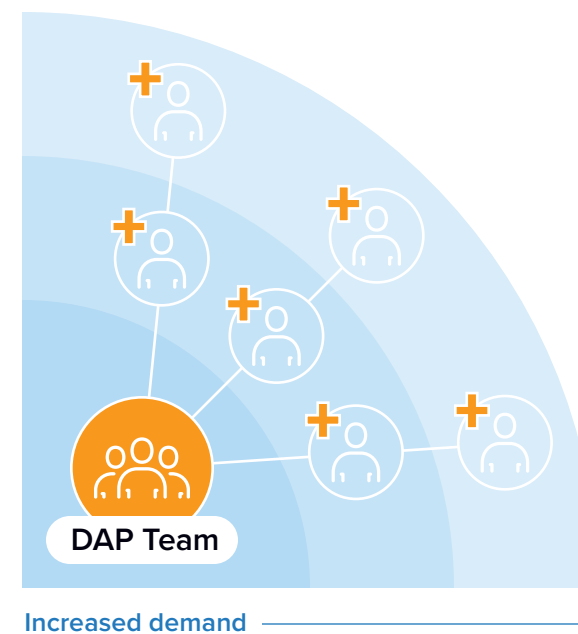
A DAP can amplify the employee or customer experience as a branded asset, built to stand out. Branding for WalkMe can vary from a completely white-labeled experience to a fully humanized digital coworker. Communications and marketing leads are valuable in helping create an on-brand, integrated user experience.

Address changing business needs.

Mergers and acquisitions may increase DAP deployments or users. DAPs can be part of new product rollouts to clients or global expansion plans. Determine if DAP expansion can be transitioned externally or internally from the original deployment model.

Expand the DAP team.

New team members can be added to meet increased demand, or workers can be engaged on a short-term contract if it's not possible to add fulltime support. Teams may need to expand their skills in building user experiences or managing requirements.



Performance Evaluation and Tracking

Show that measurement matters.

Most initial engagements are driven by clear value to the business. Without proof-of-concept demonstrations, organizational leaders may not be convinced that DAP deployments are a strategic component of business growth. DAP leaders should establish key performance indicators (KPIs). Measurable success ensures ongoing cross-functional executive support, momentum for employee experience adoption, and improved sales.

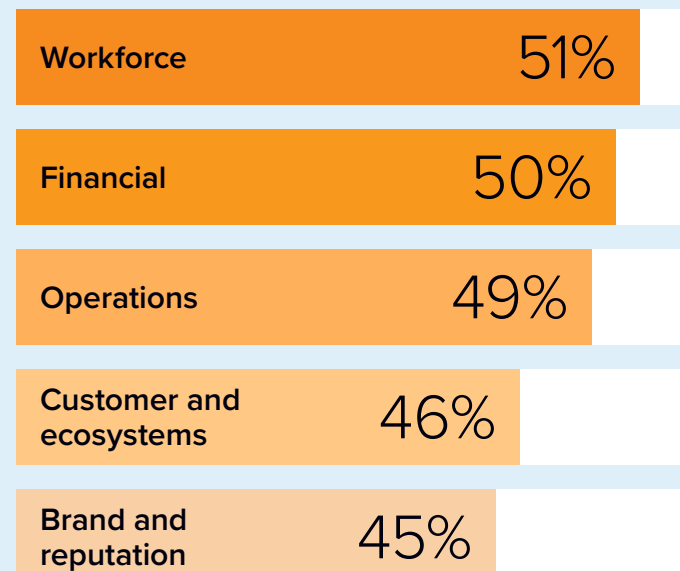
Demonstrate how DAPs contribute to broader business value.

Accelerated digital transformation, remote and hybrid work models, and transformed policies and processes all contribute to the need for rapid EX adoption of new applications, platforms, and approaches.

“Using WalkMe we saw two huge improvements from one of the early offerings around product NPS and then the support experience NPS [from our customers].”

SENIOR STRATEGY CONSULTANT, FORTUNE 100 TECH FIRM

Which resiliency metrics does your organization implement?



Source: Future Enterprise Resiliency and Spending Survey Wave 2, IDC, February 2021; n = 79

PHASE 2: Building Out Core Deployment

Performance Evaluation and Tracking continued

Establish important KPIs.

Usage alone does not prove value. Basic KPIs focus on how many applications use WalkMe and the number of users. Instead, consider more sophisticated metrics that show clear business value. DAP deployment is one way organizations can map improvements to operational excellence, data integrity, reduced fines, cost savings, etc.

EMPLOYEE ENGAGEMENT KPIs

- Speed to onboarding
- Employee satisfaction
- Productivity
- Reduced support tickets
- Improved license utilization
- Streamlined change management
- Software licensing savings
- Improved speed to proficiency, specifically application navigation and use of WalkMe

“Our company is growing so rapidly, we get tons of support. If I could any way contribute [to] deflecting some of that support, that is where I would show real dollar value.”

HEAD OF DIGITAL ADOPTION, CLOUD COMPUTING PLATFORM

CUSTOMER ENGAGEMENT KPIs

- Improved customer satisfaction (Net Promoter Score, customer satisfaction rating)
- Conversion rates
- Reduced support call volume
- Reduced training investment
- Development savings

PHASE 3

Finding Opportunities for Future Digital Adoption Platform Growth

CLICK BELOW TO NAVIGATE

- Internal Expansion of Employee Experience
- External Expansion of Customer Experience

Internal Expansion of Employee Experience

Secure a WalkMe enterprise license agreement (ELA).

Showing improved business value with the initial WalkMe deployment ensures broad organizational understanding of what DAPs offer, a critical element of securing support for an ELA.

Refine existing deployment.

Some organizations refine their deployment and analytics models around user segmentation. They examine the engagement behaviors of certain subsets of users while still ensuring privacy.

Expand geographically.

Companies that started DAP deployments in one geographic area may have expanded (sometimes rapidly) to other areas. For some, the pandemic or other disasters have forced a shift to using contract employees in unaffected locations. The financial firm's goal was to unify ERP usage across existing satellite offices. The health organization wanted to expand services in Chile, Mexico, and Colombia.

Once and Done

For the healthcare organization, the tipping point was a cross-functional senior executive meeting to review the initial deployments. The team realized the efficiency of making a unilateral decision to deploy DAP across the organization versus repeated conversations about each newly requested deployment.

The company had already deployed WalkMe on 15 applications; they are considering purchasing an enterprise license for similar reasons.

Move from customer to employee deployment.

Organizations that used WalkMe for external sales can expand DAP applications cross-functionally to improve their own organization's performance. Having seen a DAP as a differentiator for clients, deployment teams are in a unique position to serve as ambassadors for EX deployments.

External Expansion of Customer Experience

Expand the DAP from employees to customers.

Having successfully implemented DAPs internally across finance, business analytics, and talent functions, the cloud computing platform company is considering CX deployments with clients.

Expand to candidate and client experiences.

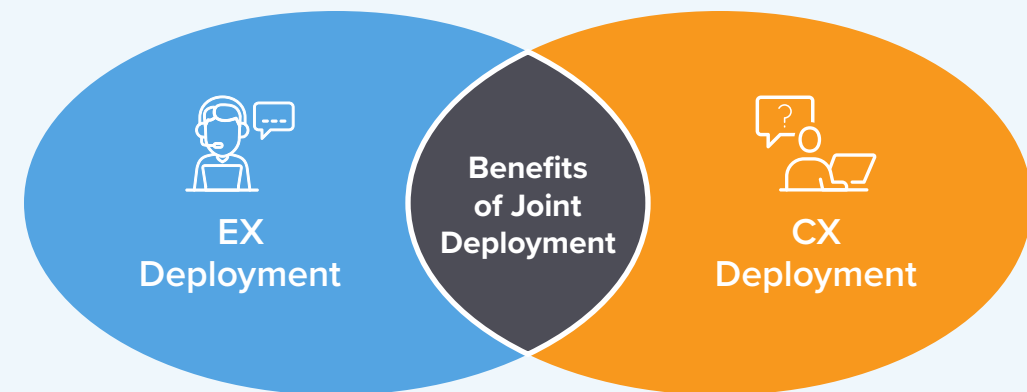
The large healthcare organization is improving their candidate and patient experiences over the next 12 to 18 months. As their L&D lead noted, *“All of our work today from a WalkMe perspective has been focused on the internal associate, the employee. But we don’t have WalkMe public-facing anywhere. We need additional layers of support on our patient portals and things like that.”*



RECOMMENDATION:

To staff for rapid growth, onboard DAP team members via six-month contracts to evaluate performance and bypass headcount concerns.

Benefits of Joint EX and CX Deployment: Shared DAP Best Practices



- Unified DAP governance
- Consistent internal and external user experience
- Expanded DAP ROI through internal and external savings and growth
- Lower customer support volume
- Improved speed to resolution on support requests

Summary and Recommendations

The journey to deploy digital adoption platforms depends on key business priorities, but the important takeaway is to align DAP deployment to business and digital transformation strategies. An iterative, agile approach will help accelerate the goal of gaining DAP analytics and insights. IDC research has shown that data-driven organizations that improve employee and client experiences are more resilient and prepared for the future.

CLICK BELOW TO NAVIGATE

- **IDC General Recommendations for DAP Deployments**
- **Additional IDC Recommendations for Employee Experience Deployments**
- **Additional IDC Recommendations for Customer Experience Deployments**

SUMMARY AND RECOMMENDATIONS

IDC General Recommendations for Digital Adoption Platform Deployments

- ▶ Continuously assess core business challenges.
- ▶ Identify and preemptively engage key executive sponsors and stakeholders across IT, legal, and line of business.
- ▶ Have a socialization plan to share DAP best practices, success, and lessons.
- ▶ Start with a brief trial deployment to start running analytics and document user challenges.
- ▶ Confirm security and privacy requirements (including legal or industry guidelines).
- ▶ Review internal analytics to document ROI/user value and to promote DAP expansion.
- ▶ Establish cadences for deployment, app review, and reporting.
- ▶ Apply DAP data and insights to understand how tech stack is performing and where to invest.
- ▶ Establish channels to address user feedback to iterate and refine deployment approaches.
- ▶ Seek opportunities to reaffirm value of DAP with key sponsors and address gaps in support or knowledge.
- ▶ Consider strategic growth plans for DAPs to branch beyond initial deployments, covering both customer and employee experiences for greater ROI.

SUMMARY AND RECOMMENDATIONS

Additional IDC Recommendations: Employee Experience Deployments



- ▶ Invite internal stakeholders, designers, and SMEs to DAP demonstration to discuss how teams can use WalkMe.
- ▶ Prioritize projects with the greatest potential for ROI.
- ▶ Assess opportunities or friction points across internal departments or business units and across border deployments internationally.
- ▶ Confirm how the DAP experience will be branded for employees, ranging from generic “guidance” to personified personas or brands.
- ▶ Address any governance gaps associated with a center or excellence or distributed model.
- ▶ Continue to triage which applications are most business critical when expanding DAP deployments.
- ▶ For on-premise in-house deployments, check data privacy and security concerns and provide the right disclosures.

SUMMARY AND RECOMMENDATIONS

Additional IDC Recommendations: Customer Experience Deployments



- ▶ Invite product owners to DAP demonstration to review how the team can use WalkMe for clients.
- ▶ Ensure DAP deployment is seen as a core competitive advantage for business owners.
- ▶ Experiment with WalkMe software on multiple offerings (the same code may not run everywhere).
- ▶ Run compatibility tests with different software types to configure WalkMe accordingly.
- ▶ For on-premise client deployments, check data privacy and security concerns and provide the right disclosures.

Methodology

Research and recommendation in this Digital Adoption Platform Deployment Guide were derived from a combination of qualitative and quantitative approaches to better understand the mechanics and market opportunity for DAP implementation. The IDC research team conducted seven interviews with WalkMe customers and senior executive leaders in May 2021. In addition, IDC survey and market data were used to contextualize and refine recommendations derived from qualitative content analysis.

About the Analyst



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Amy Loomis is Research Director for IDC's worldwide Future of Work market research service. In this role, Amy covers the growing influence of technologies such as artificial intelligence, data analytics, robotics, augmented and virtual reality, and intelligent process automation in changing the nature of work. Her research looks at how these technologies influence workers' skills and behaviors, organizational culture, worker experience, and how the workspace itself is enabling the future enterprise.

[More about Amy Loomis](#)

Message from the Sponsor

WalkMe's cloud-based Digital Adoption Platform enables organizations to measure, drive, and act to ultimately accelerate their digital transformations and better realize the value of their software investments. Our code-free platform leverages our proprietary technology to provide visibility to an organization's CIO and business leaders, while improving user experience, productivity and efficiency for employees and customers.

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