

Drive a winning CRM strategy for sales in 4 simple steps.

A 4-step plan to navigate successful digital transformation - leveraging data to simplify the process from lead to close and drive revenue growth.



The way we sell has changed. Today, it's not good enough to be good at sales—a strong sales organization needs strong digital skills. To be competitive, they need all the value sales applications were designed to provide—and then some.

According to McKinsey & Company's "By the numbers: what drives sales-growth outperformers" [survey](#), sales outperformers are 62% more effective in using digital tools. Sales reps need to be 'smart users of smart tools.' However, 'smart' tools such as CRM are often not business process-friendly or intuitive, fueling employee resistance, frustration, and discontent.

In short, CRM applications, such as Salesforce®, are smart in some ways but not in others.

While managing business processes across the sales cycle, your sales reps are delayed by technical challenges. So, rather than investing their time in prospecting, building pipeline, managing opportunities, creating quotes, and signing deals, they are spending valuable hours navigating a CRM labyrinth and completing menial tasks. And any investment in software proficiency overlaps with time spent on the actual job at hand, reducing selling time. The current progression toward the remote and hybrid workforce model exacerbates these challenges further still.

Unintuitive software inevitably compounds the problem it was acquired to fix.



Technology has become the challenge it was used to solve.

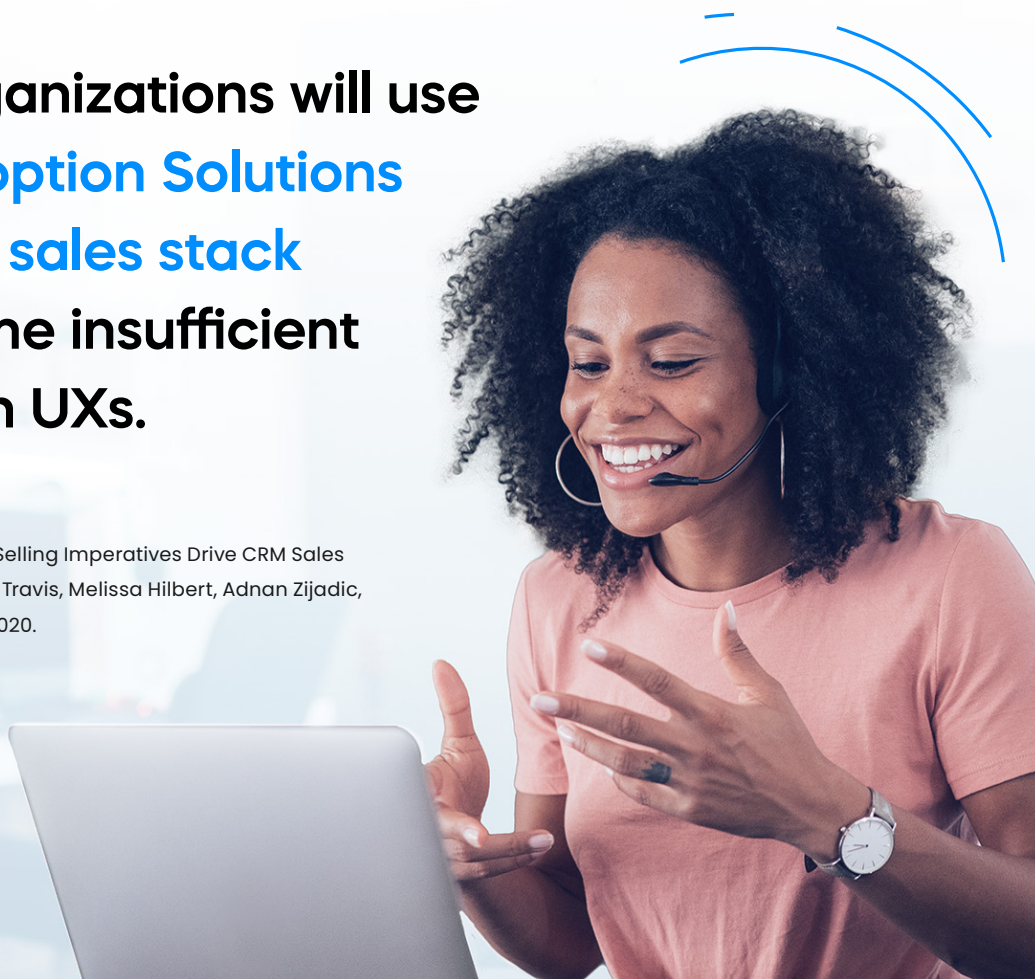
According to Gartner® Future of Work Trends, “A recent survey identified that two-thirds of employees encounter digital friction at work.” The report defines digital friction as “unnecessary effort exerted to use data or technology for work.”¹

Overcoming user challenges requires a solution that can course-correct when employees are off-path — whether they are aware they have gone astray or not. One that gets new CRM users up and running quickly and guides sales reps throughout the sales cycle to make them as productive as possible. A solution that streamlines multi-step, data-sensitive processes.

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**By 2025,
80% of organizations will use
Digital Adoption Solutions
across the sales stack
to overcome insufficient
application UXs.**

Gartner, “Predicts 2021: New Selling Imperatives Drive CRM Sales Technology Roadmaps”, Tad Travis, Melissa Hilbert, Adnan Zijadic, Ilona Hansen, December 3, 2020.



¹Gartner. “Future of Work Trends: Information Finds You”, Stephen Emmott, Michael Woodbridge, October 15, 2021. Disclaimer: GARTNER is a registered trademark and service mark of Gartner, Inc. and/or its affiliates in the U.S. and internationally and is used herein with permission. All rights reserved.

How to turn CRM users into sales outperformers: Navigating successful digital transformation

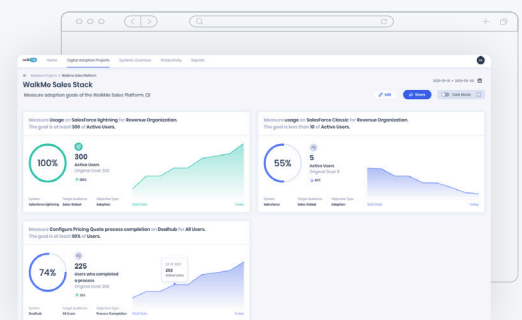
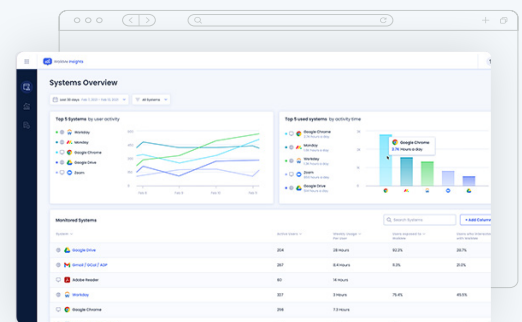
Before designing a solid digital adoption strategy for CRM, your sales organization needs data and visibility to gauge how your sellers are truly performing based on software usage and business process completion. This enables you to see where your sales reps struggle and how your newest reps are onboarding.

After unlocking this data, you can act to ensure your sales reps are no longer wasting time navigating unintuitive software or scrambling to keep up with software change. Remove the CRM hurdles, and let them focus on selling and ensuring they meet or exceed their quotas.

A digital adoption strategy for sales: a 4-step plan.

Drive sales efficiency and growth with a data-driven digital adoption strategy.

1. Define your goals. >
2. Understand points of user friction with machine learning. >
3. Act based on data-driven decisions. >
4. Improve user experience across your tech stack. >



1. Define your goals.

Set digital transformation KPIs.

Without defining the right success metrics, your sales organization cannot truly understand or measure its digital transformation goals or investments.

Why did you buy a CRM or forecasting tools? What business goals were these tools intended to solve? That's the question sales executives should be asking with every new software introduced into their organization. According to data from WalkMe, most common sales specific goals for software include:



User
satisfaction



Application
adoption



Process
completion



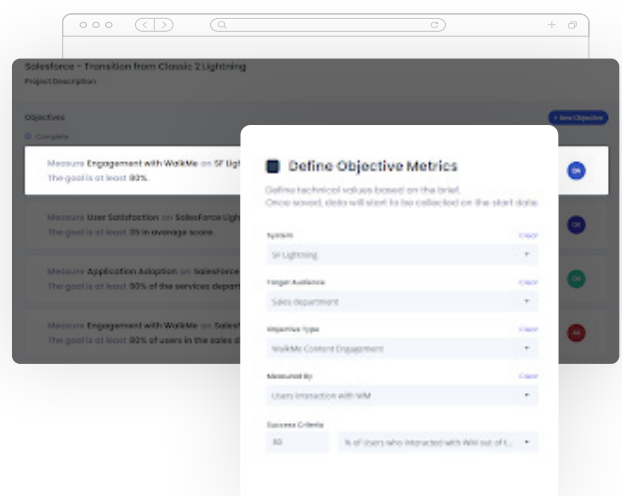
Training and
onboarding

These goals are measured based on pre-defined KPIs which enable you to measure the success of your digital transformation efforts. Common metrics include the percentage of satisfied or on-boarded users for the software, or a specific business process completion rate such as the number of payment tasks completed or the number of new opportunities updated.

Digital Adoption KPIs

WalkMe's powerful data and analytics platform provides you with the full set of tools and means to ensure digital transformation success – starting with the data needed to define and track progress to the tools necessary to empower user experiences.

Using WalkMe's Management Dashboards, you can define and track your business's digital transformation KPIs, including software usage and feature adoption.



In the example below, we see how to measure a migration from Salesforce® Classic to Salesforce Lightning®. While goals vary by organization, the primary goals accompanying any CRM adoption strategy are:



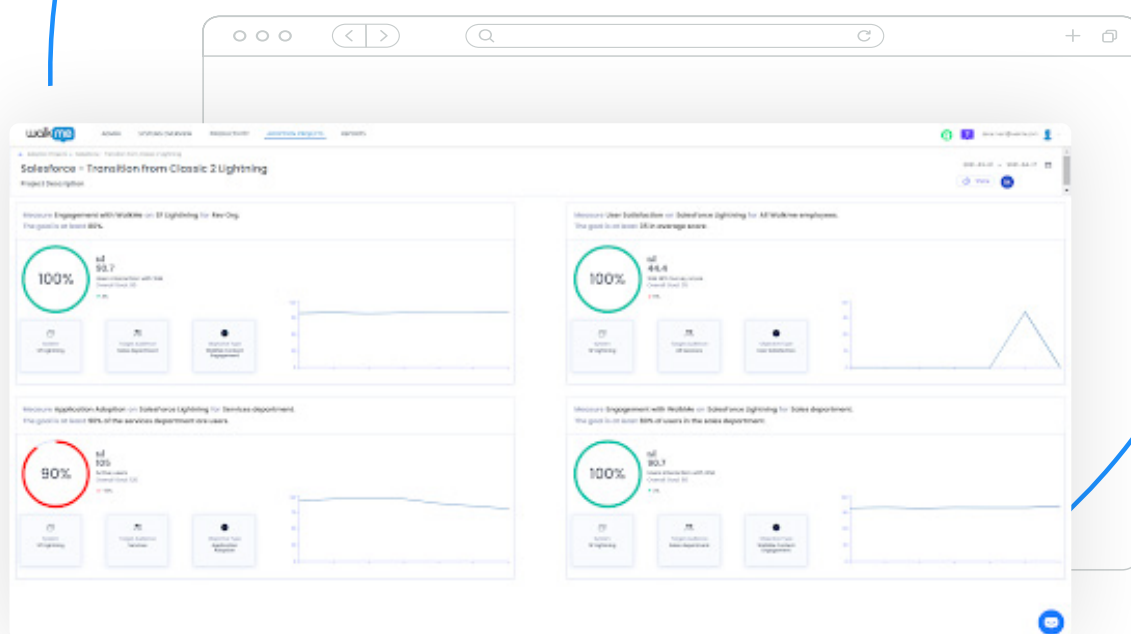
High employee engagement and adoption of the CRM application



Low cost and minimal time spent on internal CRM training and onboarding



Successful and accurate completion of in-app processes [such as converting leads to opportunities]



Unsure what KPIs to set?

If you don't know what KPIs to set, WalkMe's predefined templates and solutions, which are based on thousands of implementations across industries and proven best practices, are a great place to start. Contact our support team to learn more.

Thermo Fisher Scientific is a digital innovation leader, helping its customers advance science and technology. Thermo Fisher faced technology challenges of its own: many sales reps struggled to use Salesforce® effectively and consistently leading to a high amount of support tickets and an unorganized database. Additionally, the company needed a tool to improve its change management strategy communicating new features and updates.

[Learn more](#)

20%

reduction in
Salesforce®-related
support tickets

2000%

increase in accurate
data collection

90%

engagement rate with
WalkMe features saving
users 2 to 3 hours per day



2. Understand points of user friction with machine learning.

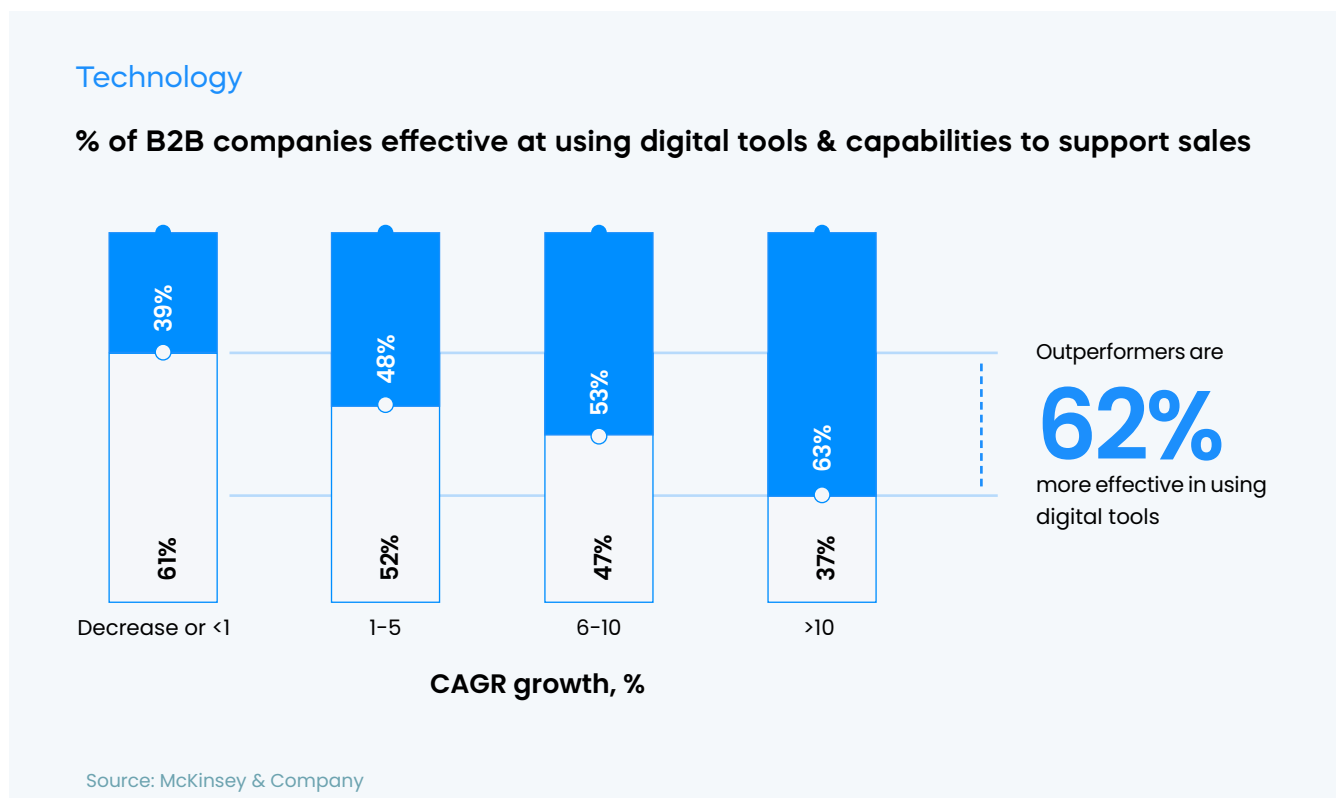
Connect business goals to experience.

A direct correlation exists between poor software user interface and slow rates of digital adoption — leading to user resistance, data entry errors, and lost opportunities.

According to Gartner® Cultivate the Voice of the User to Generate High-Value Adoption of Software Products report, “By 2025, more than half of users will resist (i.e., using minimal features, avoiding or delaying) using applications that deliver a poor user experience (UX), up from 40% in 2021.”²

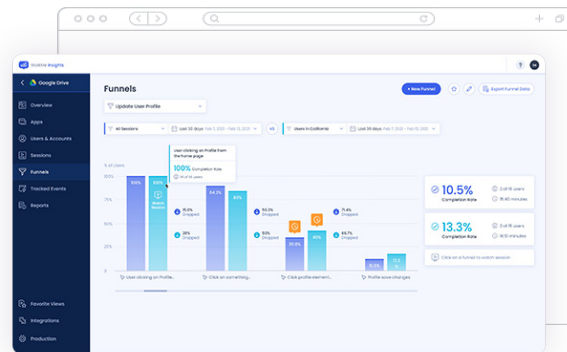
Why is adoption so key to business success?

According to McKinsey, “the combination of smart tools and strong adoption translates to higher sales.” Your sales reps need digital dexterity and support to successfully navigate smart tools. Put simply, the digital adoption of smart sales tools will have a positive impact on your bottom line.



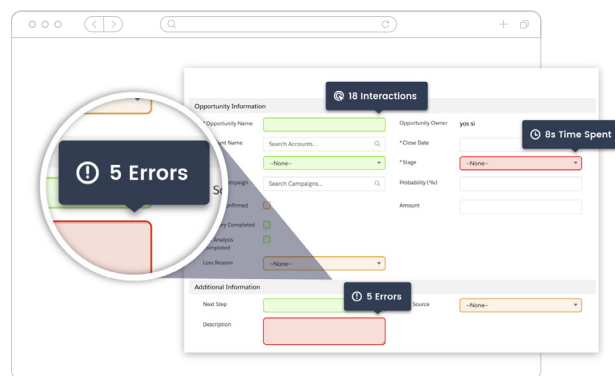
²Gartner. “Cultivate the Voice of the User to Generate High-Value Adoption of Software Products”, Craig Roth, September 16, 2021.

Designing a user experience based on a data-driven approach starts with visualizing how your employees use their CRM to identify friction points and fractured workflows. This data gives you a roadmap to drive employee engagement, ensure successful task completion, automate processes, and safeguard data integrity.



WalkMe's Digital Experience Analytics (DXA) tracks engagement with your underlying applications and analyzes user journeys so that you can identify software usage trends and challenges, see exactly where employees are dropping off in a process, and understand which new features are being adopted or not.

Additionally, you can leverage machine learning and industry best practices to make informed decisions based on actionable data. WalkMe recently introduced UI Intelligence for Salesforce® Lightning and [Microsoft Dynamics 365™](#) which identify where your employees have the most friction, high error rates, and inefficiencies in form fills – and most importantly, the action required to optimize workflows.



Over time, these form fill errors can have major business implications. According to initial data gathered, 20% of users fail to complete a full form. Out of these, 90% are due to improper form completion, and 10% are due to incorrect data inputs. From an employee efficiency and productivity standpoint – it takes employees 30% more time to resubmit a form completed unsuccessfully the first time.

rh Robert Half® Robert Half leverages WalkMe to ease the transition to becoming Salesforce® Lightning enabled by empowering employees through intuitive self-service learning.

[Learn more](#) >

10,000+

field users across
18 countries using
WalkMe

Real-time
**support
reduce**
“how to” questions

Personalized
“on the spot”
coaching leads to
improved outcomes

3. Act based on data-driven decisions.

Leverage data to drive business value.

According to [Futurum Research](#), 42 percent of organizations rate the lack of technical knowledge and skills as their number one barrier to successful digital transformation. Designing and implementing a digital adoption strategy will rectify this by putting users first.

Data has little value if you don't know what to do with it. With WalkMe's code-free editor, apply the data you've unlocked to design experiences for employees using a suite of features that deliver on-the-spot guidance and drive engagement, productivity, and efficiency.

Create content that is personalized to each type of user, and contextualized to application and business processes — keeping your sales teams going regardless of new feature rollouts, browser updates, and platform version releases. Getting started is even simpler with ready-to-go templates from WalkMe's Solution Gallery.

4. Improve user experience across your tech stack.

Leverage user experience to realize sales goals.

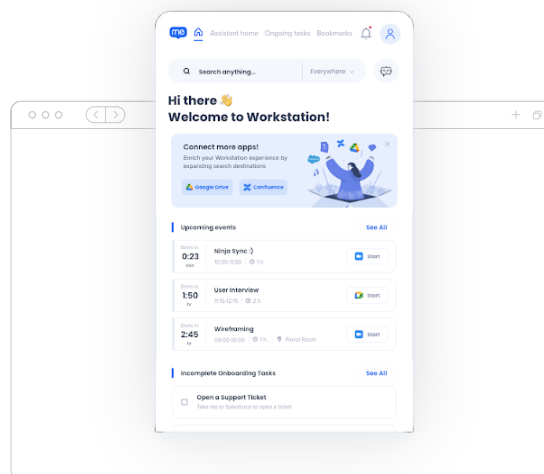
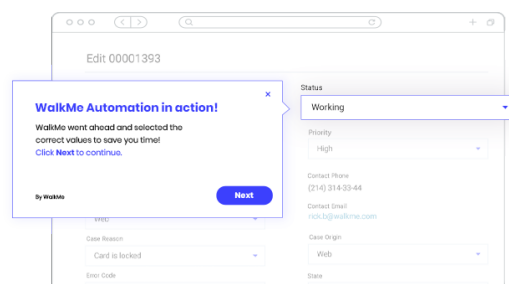
Your sales reps rely on their CRM and a myriad of other software applications to do their jobs. Yet, according to Futurum Research, “as many as 54 percent of companies have reported employee resistance to digital adoption in general, caused by a number of factors, ranging from anxiety about having to learn new things to overly packed work schedules.”³ In other words, your sales reps are overwhelmed and too busy to learn new software.

With the help of digital adoption technology, your sales reps can continue doing their job, regardless of the underlying application they need to use. WalkMe’s Digital Adoption Platform (DAP) is designed to leverage the user interfaces and behavior across applications with pre-structured and context-specific guidance.

By automating cross-application processes, DAP increases your sales reps’ productivity without wasting time and effort on training, searching for help, or retrieving information.

Other experience-focused capabilities include WalkMe’s natural-language ActionBot and desktop-based solution, Workstation, which offer advanced enterprise search capabilities to more easily access much-needed resources such as knowledge bases, support sites, documents, and more. Contextual communication and targeted notifications enable your teams to push updates in context as well as onboarding streams for newcomers.

The versatility of DAPs, says Joseph Poyma, digital adoption leader at Cross-Country Mortgage LLC, explains why **“We call our DAP our Swiss Army knife.”**



³ Futurum Research, An Enterprise Guide to Digital Adoption. 2021



Sprinklr deployed WalkMe for both its employees and customers, offering easy-to-use, in-app guidance that engages end users and effectively reduces the company's internal support burden.

[Learn more](#) >

85%

reduction in
employee support
tickets on a travel
management tool

30%

increase in time
spent by customers
in the platform

330%

increase in
customers who used
top new features
within two weeks

Drive successful digital transformation.

Realize the value of your technology.

While your employees may not be the decision-makers in the digital transformation process, their actions — or inaction — will in large define its success. If sales reps can not accurately maneuver their CRM to enter data accurately, and forecasting is consequently compromised, value has not been achieved. However, If your sales team is immediately able to leverage the software as intended, then the successful user experiences you have created will enable you to realize the value of your technology.

The true value is not only about gaining more out of existing or new software — it's the ability to continuously gain value regardless of changes in business goals, employee and customer expectations, or changes to software.

For more information about WalkMe for Sales, [click here](#).



Digital Adoption Platform

About WalkMe

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. For more information, please visit our website at: www.walkme.com

WalkMe is successfully deployed at:

