2024

The State of Digital Adoption

Beyond transformation: Embracing a digital adoption mindset on the path to HyperProductivity

walkme



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Introduction

The third edition of WalkMe's annual State of Digital Adoption report comes amidst an unprecedented shift in the global digital landscape. Last year, a staggering 70% of enterprises listed digital adoption as a strategic priority. And with global IT spend expected to increase to \$5.1 trillion and software investments set to grow by 13.8% in 2024, the importance of digital adoption in streamlining enterprise workflows is being felt more than ever.

Based on our survey of 1,700 C-level executives, heads of function, vice presidents, and directors, it's clear that almost every organization follows at least some aspects of digital adoption. This was reinforced by the findings in our survey of 2,051 line of business workers, 66% of whom feel that their employer has taken steps to improve the user experience in their software. And with 93% of enterprise leaders saying that they need to increase productivity in the next year to maintain

parity with their competitors, optimizing digital assets and their associated workflows will be key to solving many organizational challenges.

WalkMe's inaugural State of Digital Adoption report in 2021 established a benchmark for digital adoption progress. The subsequent data collected in 2022 and 2023 expanded our understanding of the evolving need for digital adoption, the resources organizations had in place, and their future strategy and investment plans.

In 2024, we are examining how, as knowledge of digital adoption breaks into the mainstream, enterprises can use established best practices to turn the global billions in software investment into real returns for their business.

Based on our research, this isn't happening yet. More than one third of digital transformation spend is on projects that do not meet their ROI due to a lack of utilization.

When we started WalkMe in 2011, enterprises still relied on traditional change management approaches, with no focus on digital adoption. Traditional methods couldn't solve new problems, tech stacks were messy, and companies were losing millions every year. Fast forward to 2024, and we see that while most organizations are prioritizing certain aspects of digital adoption, only a small percentage are embracing all the best practices needed to build an elite digital adoption strategy.

The next wave of digital transformation with AI is here, offering plenty of growth opportunities if managed correctly. WalkMe is leading the way, enabling organizations to scale new technologies across workflows enterprise wide as they gravitate towards a state of HyperProductivity. We're excited to share our findings from this year's State of Digital Adoption report and look forward to partnering with more organizations to shape the future of the digital workplace.



Dan Adika CEO and Co-Founder, WalkMe

This is partly because of an ongoing application visibility gap, which is blocking insights into workflows, and is exacerbated by the rapid growth of artificial intelligence (AI). On average, organizations underestimate the number of applications they are using by ten to one, leaving many unable to correctly follow digital adoption best practices.

This is more needed than ever. Lost productivity costs enterprises more than \$1 million a week, slowing strategic goals, and frustrating employees who feel that they are wasting their time navigating overly complicated workflows and who are becoming increasingly distrustful of corporate IT.

The good news is that the tide is turning. Enterprises are investing more in digital adoption, following established best practices, and building teams focused on increasing digital adoption across the business. This can have real benefits.

Enterprises with a mature approach to digital adoption, i.e., those that follow all digital adoption best practices, save on average **\$4.9 million a month** compared to those that don't fully embrace these methods. And these organizations are much further on their way to reaching a state of HyperProductivity.

Finally, digital adoption is intersecting more and more with the rise of AI. Digital adoption has a critical role to play in helping employees and organizations use AI tools effectively, ethically, and responsibly. At the same time, AI capabilities can enhance digital adoption even further, and help its best practices and advantages spread beyond IT.

What is HyperProductivity?

HyperProductivity is an aspirational state in which everyone can use any application with ease. It's a future where companies have automated as many processes as possible and integrated technologies into one cohesive, streamlined workflow.

Why is it important?

HyperProductivity is both a new standard of work, in which employees will be able to automate non-essential tasks to focus on impactful work, and an effective way to navigate an uncertain economic climate and any productivity challenge. This translates into a higher ROI for your digital spend while serving as an effective way to maintain a competitive edge.

How can enterprises achieve HyperProductivity?

While achieving HyperProductivity starts with giving employees the tools, technology, and support they need to operate exponentially faster and more effectively than before, it extends far beyond individual or team success. HyperProductivity challenges us to look at how these successes can be replicated and scaled organizationwide, transforming our approach to work at every level.

Methodology

- Small enterprises under 5,000 employees
- Medium enterprises -5,000-9,999 employees
- Large enterprises -10,000+ employees

This year represented a significant step up from previous editions of this report, in that we increased our respondent pool and broadened our perspective by including insights from both senior executives and line of business workers.

This report is based on two surveys: the first is of 1,700 senior business leaders (i.e. heads of function, vice presidents, directors or C-level executives) at

organizations with 500 employees or more; the second is of 2,051 office and hybrid workers. 50% (850) of the senior business leaders surveyed worked specifically in the IT function.

Both surveys targeted respondents across North America, Japan, APAC, UK & Ireland, France, DACH, Benelux and the Nordics, and were performed online in O3 2023.

3,751 Total respondents

Senior business leaders

2,051 Line of business (LoB) employees

Sample size

- 500 5,000 employees = 88%
- 5,000+ employees = 12%

Audience

- 19% C-level
- 23% Business owner/managing director
- 17% Director/president
- 41% Senior manager/vice president

Sample size

- $500 5{,}000 \text{ employees} = 74\%$
- 5,000+ employees = 22%
- Not sure = 4%

Audience

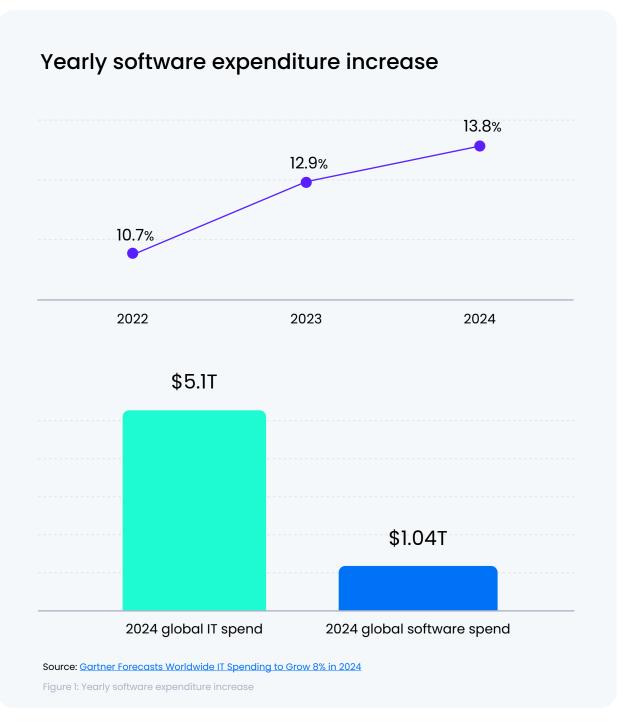
- 28% Junior manager
- 14% Project executive
- 18% Entry level/intern
- 31% Admin
- 10% Other

	North America		Australasia		UK & Ireland					Western Europe		
	USA	Canada	Australia	New Zealand	Japan	Singapore	UK	Ireland	DACH	Benelux	Nordics	France
	40%	19%	6%	3%	6%	3%	5%	1%	5%	3%	3%	6%
LOB	31%	18%	5%	5%	7%	5%	5%	3%	8%	4%	3%	7%

Part one:

Record software investments are complicating the enterprise tech stack

Despite a period of global economic uncertainty characterized by slowing growth, disrupted supply chains, and political and climate upheaval creating new challenges for organizations, enterprises are investing record amounts in technology, digital transformation and software, including an expected \$1.04 trillion in global software spend.



Digital spend is failing to deliver on its expected ROI

Digital investments often fail to deliver on their promises, and, at present, enterprises are not maximizing their software ROI. On average, 38% of digital transformation efforts over the last year failed to meet their objectives due to a lack of adoption by end users. For medium sized enterprises, that number increased to almost 46%, amounting to \$12.7 million in wasted spend.

Before maximizing software ROI, it's critical to first lay the groundwork for understanding the technology ecosystem. This means having a clear view of your tech stack and ensuring employees are fully leveraging the applications at their disposal to optimize workflows.

Enterprises are overspending on tech and failing to meet ROI

Percentage of digital transformation spend on projects that did not meet their ROI due to lack of end user utilization.

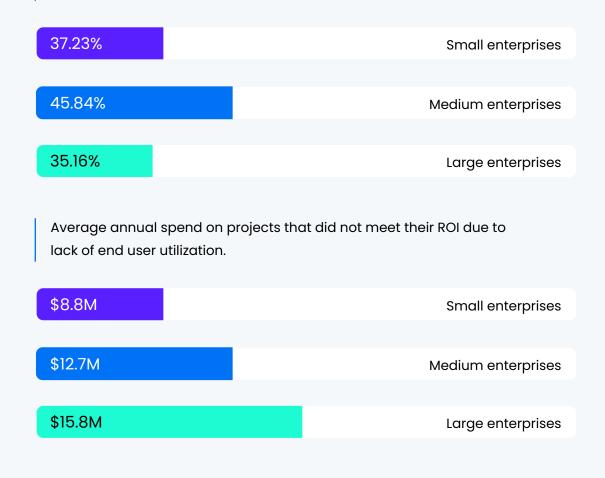


Figure 2: Enterprises are overspending on tech

(Un)Managing digital adoption without software visibility

One of the main barriers to an effective digital adoption strategy is a lack of visibility into the applications in a tech stack and how they are being used across enterprise workflows. If an enterprise cannot accurately evaluate the software it's using, it cannot identify areas of improvement, define success, and increase adoption and engagement. Indeed, 70% of enterprises lack full visibility into application adoption. This creates a ripple effect that prevents them from utilizing digital adoption best practices across workflows. 73% of enterprises who have developed a digital adoption strategy have yet to realize its full potential, while 68% would like to design improved application user experiences to increase adoption, but find it too time consuming and expensive.

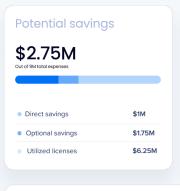
70%

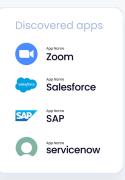
Enterprises lacking full visibility into application adoption.

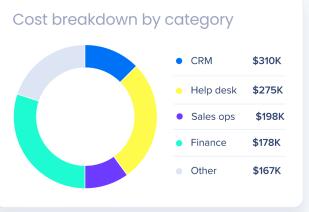


Benefits of application visibility









"

"[Application] data provides insight into what software is most strategic to our sales team, so we can optimize software investment and the way we enable and engage them through digital adoption."

cisco

Steffaney Zohrabyan

Sales enablement insights and innovation, Cisco

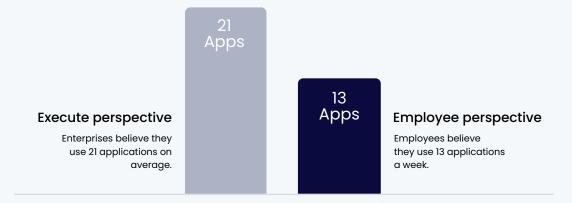
.Figure 3: Benefits of application visibility

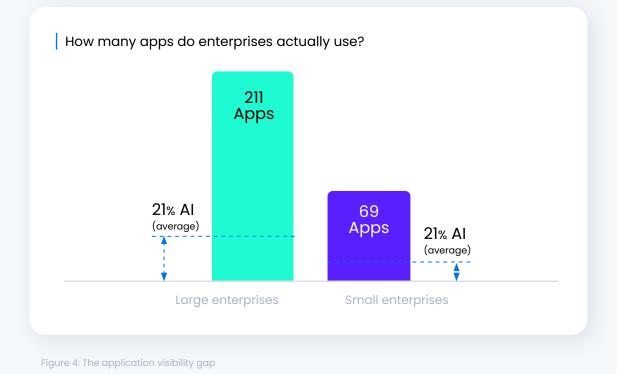
The software visibility gap amidst the AI revolution

While enterprise leaders believe they only use 21 applications and employees say that they use 13 every week, in actuality, large organizations use 211 applications while smaller ones use 69. This disparity highlights a significant awareness gap that could lead to substantial unrealized value from underutilized or even redundant tools, contributing to unnecessary expenditures.

Furthermore, according to the American Productivity & Quality Center's (APQC) Process Classification Framework, there are approximately 1,900 business <u>processes</u> across enterprises, which makes it difficult to track cross-application workflows. This problem is compounded by the fact that 21% of the applications that the average enterprise uses are AI, which they oftentimes have little visibility or control over.

The application visibility gap



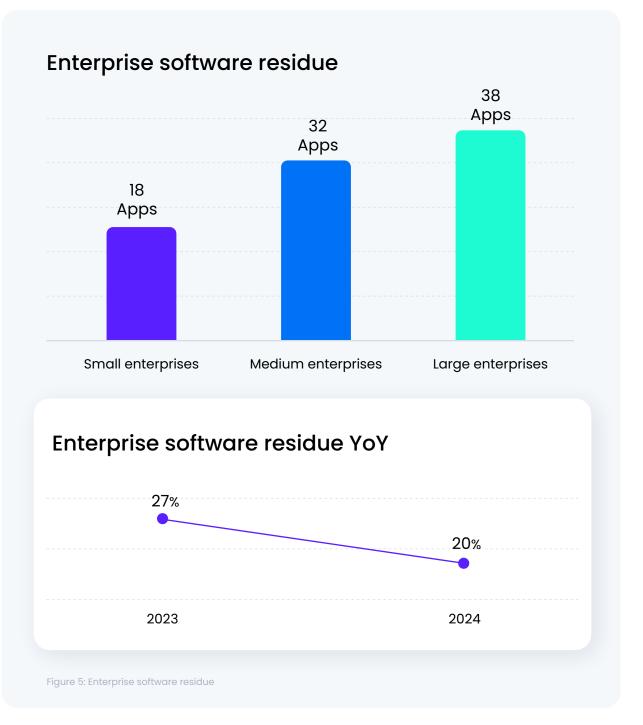


¹ For the purpose of this report, an AI application refers primarily to AI-native applications, where AI is integral to the product's core functionality.

The persistence of software residue

Adding to the visibility gap is software residue, a term WalkMe coined to describe the hurried adoption of new technologies during the COVID-19 pandemic and the transition to hybrid work, without a reassessment of existing systems. This has resulted in a proliferation of overlapping and redundant applications, with 93% of enterprise leaders acknowledging software residue in their organizations.

Fortunately, the situation is improving. In WalkMe's previous State of Digital Adoption report, we noted that 27% of enterprise applications duplicated the features of other applications. That number has since fallen to 20%, signifying that enterprises are taking back control of their software stacks in the post-pandemic workplace.



Leading causes of lost productivity



A lack of knowledge of what resources (e.g. software, skills) the organization has available



Older technology or ways of working that are not always sufficient to meet modern demands



A lack of training on best practices and processes



An inability to use technology effectively



Employees that are not engaged with their work



Employees having to wait for support and instruction



A lack of clear direction for employees



Employees' mental health



A lack of incentives for employees



Insufficient tracking of employees' activity

Part two:

The consequences of rampant digital spend

Enterprises currently find themselves in the middle of a paradox: on the one hand, they are spending more than ever on streamlining their digital assets to increase output, while on the other, their employees suffer from a lack of productivity. 93% of enterprises say they need to increase productivity in the next year to maintain parity with their competitors. Furthermore, lost productivity costs enterprises \$1.14 million every week.

Figure 6: Leading causes of lost productivity

The cost of the productivity paradox

According to our analysis, the leading causes that hinder organizational efficiency and employee performance are a lack of knowledge about available resources, outdated technologies or ways of working, and inadequate support structures. A comprehensive approach to boosting productivity must take into account updates in technology and workflow practices, enhanced training, knowledge sharing, and employee support and engagement. Addressing these related factors could lead to a more efficient and satisfied workforce.

Failing to address the bottlenecks of lost productivity, including a lack of digital dexterity, prevents employees from effectively executing their cross-application workflows, impacting morale and business output.

Employees spend on average 43 working days a year, or 16% of their time, compensating for a lack of knowledge about their digital tools. Meanwhile, 32% report having to regularly work late because of hard-to-use technology, and 31% have missed or had mistakes with at least one day of holiday or sick leave in the past year because of hard-to-use HR systems.

Lost productivity is damaging employee morale



of working days a year are spent by employees compensating for a lack of application proficiency.



of employees regularly have to work late because of hard-to-use technology.



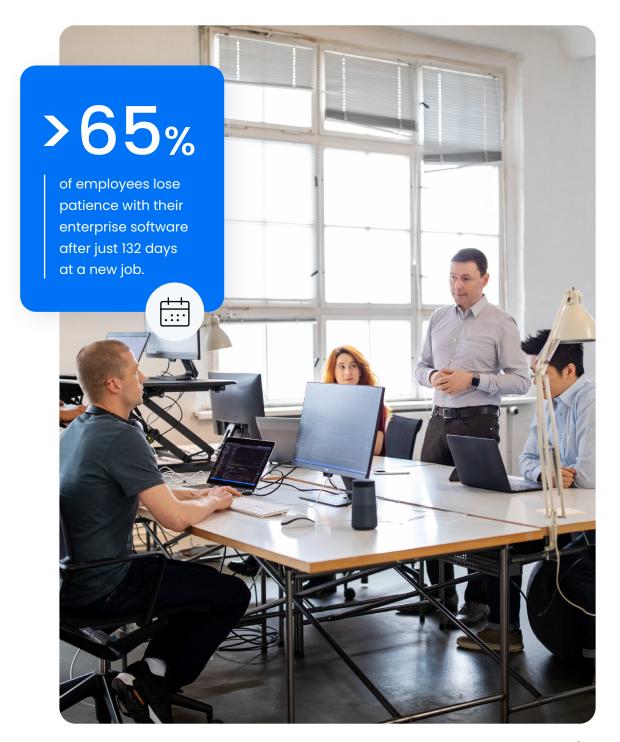
of employees have missed or had mistakes with at least one day of holiday or sick leave in the past year because of hard-to-use HR systems.

Figure 7: Lost productivity is damaging employee morale

Dealing with an unmanageable situation

Our data indicates that the productivity paradox has already become unmanageable for many enterprises and is directly impacting how they manage workflows. 40% of employees resent how hard-to-use corporate technology is. Meanwhile, within a mere 132 days, less than a tenth of the average employee tenure, more than 65% of employees face significant frustrations with corporate technology. This poses a long-term risk to maintaining a robust and satisfied workforce.

This is evidenced by the amount of time employees spend compensating for poor technology experiences, including spending extra time on tasks because they can't use their software effectively, or because they have to ask colleagues or search for help online. Taken together, this amounts to more than 350 hours every year in lost productivity per employee. To put this in financial terms, considering the median salary in the US is \$58,000, the lost productivity translates to approximately \$10,000 per employee annually. This calculation highlights the substantial economic impact of technological inefficiencies on businesses.



Dealing with legacy change management programs

In addition, the rapid pace in which enterprises are onboarding new software has left employees frustrated with their organizational change management programs. 45% of employees say that their employer is introducing new technologies without considering how they will be used or what extra training employees will need, while 69% say that their last change management experience was negative.

Enterprises and employees alike know that the situation needs to change. Organizations that can evolve their approach, and focus energy where it is most needed, will see significant boosts to productivity and their ability to successfully manage workflows. A digital adoptionfocused mindset will be key to this.

Weekly time spent compensating for poor technology experiences

353 hours

Annual time the average employee spends compensating for poor technology experiences



Spending extra time on tasks because you can't effectively use the software applications you're given, slowing you down	1.4 hours
Spending extra time on tasks because you need to ask colleagues or the internet for help	1.3 hours
Waiting for your employer's support team to respond to a query so that you can finish a task	1.5 hours
Having to use another way to complete a task because the tools you're given just aren't good enough	1.4 hours
Trying to decipher instructions and advice on how to use technology that isn't clear	1.2 hours

Figure 8: Weekly time spent compensating for poor technology experiences

Part three:

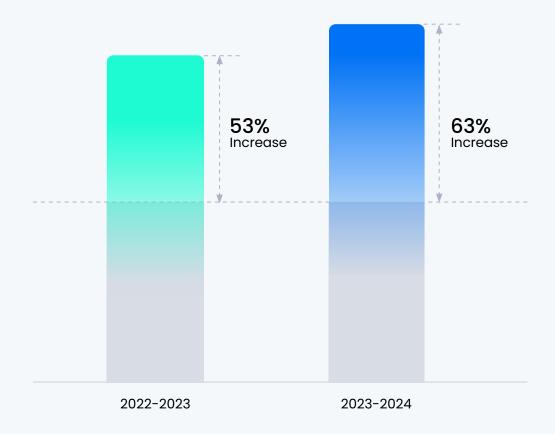
Building a digital adoption mindset

Having established the challenges and financial impacts of the productivity paradox, we now turn to how enterprises are responding. 69% of enterprise leaders say that organizations that don't embrace digital adoption will find themselves in an unsustainable position by 2028.

In 2023, 70% of enterprises agreed with the statement that digital adoption is one of their key KPIs in measuring digital transformation success. In 2022, only 22% of enterprises identified digital adoption as a key KPI in their digital transformation performance, marking a mindset shift in digital adoption's role in the enterprise world.

Furthermore, there has been a 63% increase in digital adoption investments over the last year, in such areas as in-depth training, process automation, AI, and content development that empowers users to get the most out of their digital tools. These investments are pivotal as enterprises strive to reach a state of HyperProductivity.

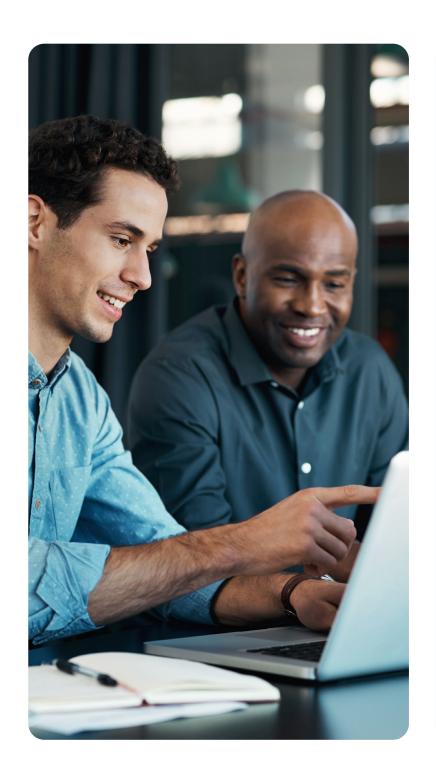
Enterprises are ramping up digital adoption



of enterprises rank digital adoption as a KPI



Figure 9: Enterprises are ramping up digital adoption



Key pillars of digital adoption maturity

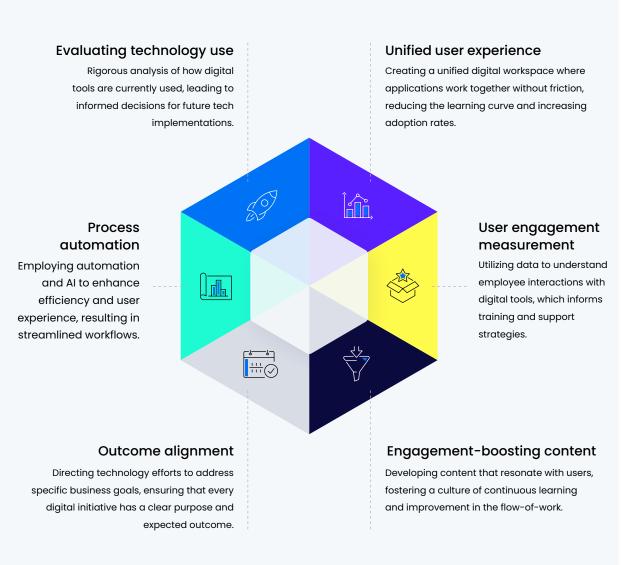


Figure 10: Key pillars of digital adoption maturity

The pillars of digital adoption

As investment and engagement has increased, so has organizations' adherence to the key aspects of digital adoption. Already, we see that 94% of enterprises are following at least one digital adoption best practice. These digital adopters in progress recognize the importance of digital adoption and have started implementing best practices, but are still on their journey towards full integration. They are in various stages of digital maturity, each learning and growing at their own pace.

Furthermore, 6% of enterprises have a mature approach to digital adoption, following all six best practices. These elite digital adopters are at the forefront of their digital transformation journeys, having integrated digital adoption deeply into their business practices and culture. Embracing these, and realizing the full benefits of digital adoption, will be key to solving many of the challenges enterprises face in 2024 and beyond.

The components of successful digital adoption

of enterprises follow all digital adoption key practices

- evaluate and measure current technology use. 45% Rigorous analysis of how digital tools lead to informed decisions for future tech implementations.
- automate processes and use Al. 44% Employing automation and AI to enhance efficiency and user experience results in streamlined workflows.
- align business outcomes. 44% Directing technology efforts to address specific business goals ensures that every digital initiative has a clear purpose and expected outcome.
- measure user engagement. 43% Utilizing data to understand employee interactions with digital tools informs training and support strategies.
- unify user experiences across applications. 42% Creating a unified digital workspace where applications work together without friction reduces the learning curve and increases adoption rates.
- build content that will boost application engagement. 42% Developing content that resonates with users fosters a culture of continuous learning while improving flow-of-work.

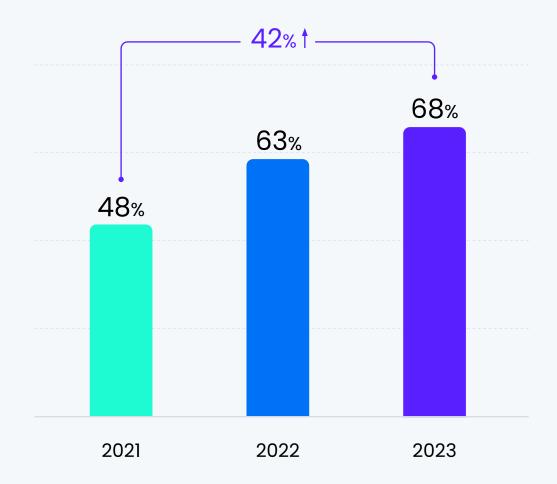
Figure 11: The components of successful digital adoption

CoEs are integral to an elite digital adoption strategy

The final component of an elite digital adoption strategy is having a team in place, also known as a center of excellence (CoE), which is responsible for managing digital adoption efforts. Here as well, we've seen an increase in the size of CoEs, with 68% of enterprises saying that they have six or more employees charged with managing digital adoption efforts, up from 63% in 2022 and 48% in 2021.

As organizations make digital adoption a KPI, boost investment, adopt more best practices, and entrust teams to manage digital adoption, they will begin to realize more of its benefits.

Enterprises CoEs are growing



Organizations with a team of at least six employees directly responsible for digital adoption across all departments.

Figure 12: Digital adoption centers of excellence

Unleashing a mature approach to digital adoption

Elite digital adopters, i.e., those that have embraced all best practices, including a CoE, show clear benefits with regards to cost optimization, productivity, workflow management and employee satisfaction compared to other organizations.

In addition to saving \$4.9 million a month, enterprises with a mature digital adoption approach spend 14% less on digital transformation projects that don't meet ROI, lose 23% less in costs associated with poor productivity, and see 18% higher ROI on digital transformation projects.

But this is only the beginning. Enterprises that have taken a mature approach to digital adoption see a 30% higher application utilization rate. Furthermore, employees at these enterprises save 3.3 hours a week and 21.5 days a year due to improved user experiences. Using the average American annual salary of approximately \$58,000, these 3.3 hours per week translate to an annual saving of roughly \$4,800 per employee. For a 1,000 employee enterprise, this adds up to an additional \$4.8 million in savings a year.

Benefits of a mature digital adoption strategy



less spend on digital transformation projects that fail to meet ROI



reduced productivity costs



higher ROI from digital transformation projects



higher application utilization

million a month Average savings for large enterprises



Unlocking a HyperProductive mindset

Elite digital adopters are also better placed to make full use of the accelerated productivity unlocked by technologies, such as AI to execute their workflows. These technologies allow employees to work exponentially more effectively than before, giving them the means to use the applications at their disposal to their full capability and bringing them closer to a state of HyperProductivity.

HyperProductivity involves expanding digital adoption best practices beyond individual roles or departments to encompass the entire organization, resulting in a more holistic and impactful transformation. Enterprises reaching this state demonstrate not just higher application utilization rates but also significant time savings for employees across all levels. This companywide adoption and integration of digital tools are what truly defines HyperProductivity.

What does a HyperProductive enterprise look like? A conceptual case study.

Background

Apex Inc. is a leading manufacturer and supplier of industrial equipment with more than 50,000 employees operating in 29 countries.

Challenge

On January 1, 2023, the German Supply Chain Act (GSCA) came into effect to enhance ESG protections in corporate supply chains. Compliance involves implementing preventive measures within supply chains, submitting annual due diligence reports, and establishing risk mitigation systems. Non-compliance can lead to an €800,000 fine and a three-year exclusion from public contracts.

Solution

Apex invested in new technology capabilities to ensure employee adherence to restricted party screening, sourcing, and supplier-import-export management procedures. Apex realized they would not achieve compliance in time or scope using traditional methods; to expedite the process and ensure governance at scale, they implemented an Al-enabled DAP to:

- Provide a conversational interface to automate workflows and ensure compliance.
- Identify and mitigate digital friction without increasing support tickets.
- Utilize real-time guidance and support to accelerate process completion.

Outcomes



productivity hours saved through low-code process implementation, task automation and improved data validation.



increase in EU-customer retention rates achieved through enhanced competitive advantage.



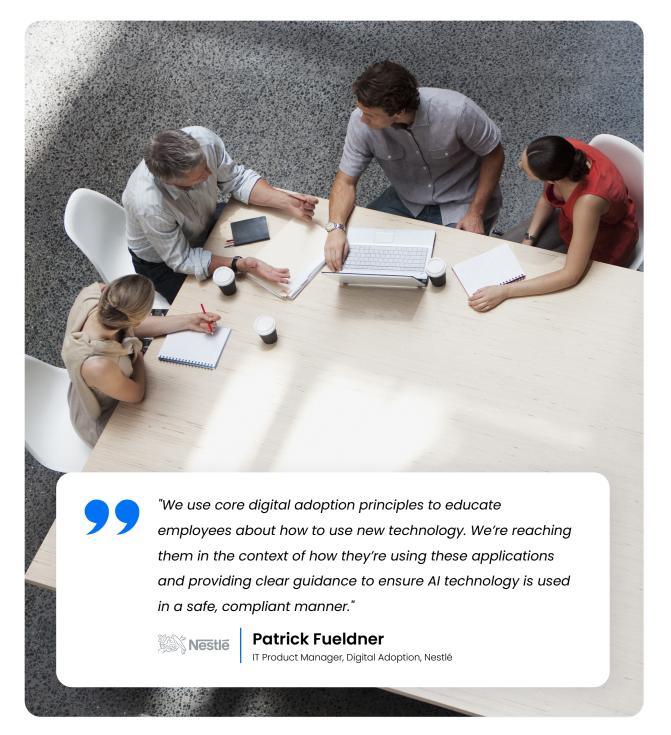
contracts.

Part four:

The future of digital adoption

Building a mature digital adoption strategy based on the pillars established above is a critical first step for optimizing workflows. At the same time, the rapid evolution in technology, spearheaded by AI, means that enterprises will need to constantly adapt to make the most of new developments and opportunities. Here, we'll dive into the future of digital adoption and how it can be used to reach a state of HyperProductivity.

Al, particularly generative Al and its specialized subset, Large Language Models (LLMs), plays a transformative role in the evolution of digital adoption.



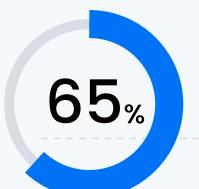
The role of IIMs in digital adoption

Used correctly, these technologies can enhance digital adoption itself through capabilities like AI generated recommendations to improve user experiences across workflows; Al generated in-app guidance; conversational interactions with software; and automated workflows. This opens up the potential of a fully digital, enterprise-wide operating system that connects, automates and simplifies interactions, boosting productivity.

At the same time, enterprises are divided as to the role LLMs will play in their digital adoption strategies in the coming years. While 65% of enterprise leaders believe that LLMs will be the norm for creating guidance for users with technology issues by 2027, 58% say that enterprises will have realized the limitations of LLMs and not see them as a universal solution.

Al on its own will not bring enterprises closer to a state of HyperProductivity. Implementing LLMs and other AI tools is a massive change management that entails risk and compliance issues and security threats, including shadow AI, data leaks, and cyberattacks. Ultimately, AI and LLMs will need to be used as part of a mature digital adoption framework that factors in governance, data hygiene, and security.

How do enterprise leaders view LLMs and conversational interface?



By 2027, the norm for retrieving knowledge will be via a conversational interface



By 2027, conversational interfaces will have reached their limits and won't be used as a universal digital adoption solution

Figure 14: LLMs and conversational interface

Crafting an effective Al framework

At the same time, enterprise leaders must work hand-in-hand with their employees to craft a responsible and effective AI framework that compliments their digital adoption efforts while providing a clear path towards HyperProductivity.

When looking at how employees view the future of Alenabled digital adoption, three points continuously popup: swapping existing tools for text-to-action interfaces, enabling Al-based security tools, and utilizing Al tools for task automation.

Effectively implementing these strategies requires the utilization of digital adoption tools, namely digital adoption platforms (DAPs), which can effectively streamline enterprise AI efforts.

Top-3 employee wish list for Al-enabled digital adoption

Text-to-action

A single text interface that understands and parses requests into actions to be completed by relevant applications.

52%

Digital guardrails

Tools that warn if actions could put the user at risk, e.g., responding to a potential phishing email.

50%

Workplace companion

Tools that can act as a "digital assistant" and automatically perform tasks in one's place.

48%

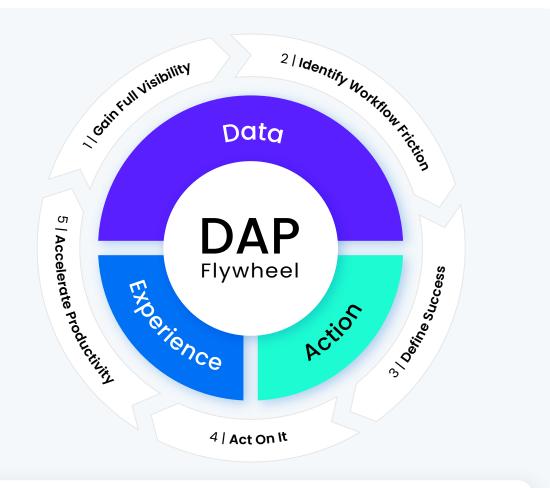
Figure 15: Employee wish list for Al-enabled digital adoption

The value of a digital adoption platform (DAP)

A mature digital adoption platform (DAP), such as WalkMe, is a valuable asset for Al-enabled digital adoption and workflow optimization. DAPs comprise three pillars - data, action, and experience - to ensure a flywheel motion of continuous improvement, which can be broken down in the following steps:

- Evaluating and measuring current processes.
- 2. Identifying areas of improvement, including friction points and opportunities within business processes.
- Defining what success looks like, including KPIs, project scope, and business goals.
- 4. Leveraging data to design and deploy user experiences that increase adoption and engagement across workflows and applications.
- 5. Ensuring immediate and intuitive access to any application, workflow, or resource as you increase process completion and improve the quality of business outcomes.

This enables organizations to introduce new technologies and expand best practices across workflows, while maintaining a consistent approach to digital adoption and allowing employees to work to their full potential.





"DAP has simplified, unified, and enhanced the user experience across our entire technology system ecosystem. By leveraging user journey analytics, we are able to identify trends and build solutions that optimize support, IT costs, training - and make people smile."

servicenow

Kris Clark

Director, Head of Digital Adoption

Figure 16: DAP flywheel

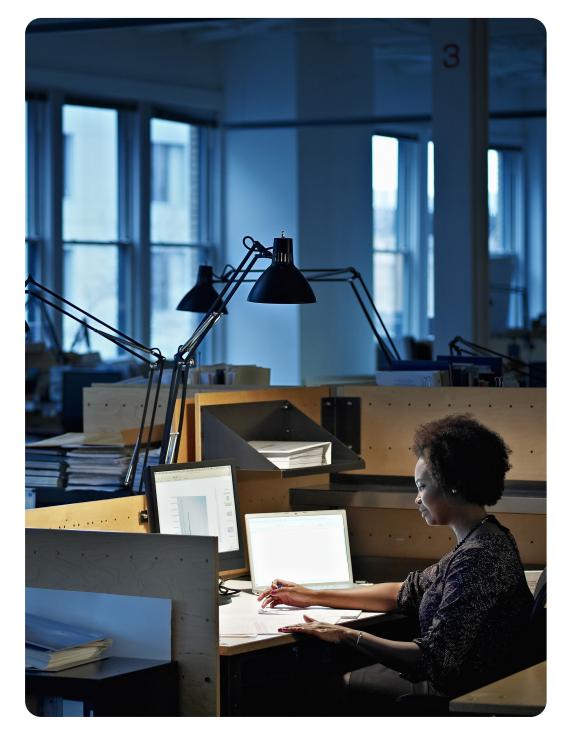
What's next for digital adoption?

There is no denying the challenges enterprises face. Organizations that cannot stem lost productivity, or adapt to economic uncertainty while following the constant march of technology will struggle. Similarly, those that cannot take advantage of new technologies, such as Generative AI, while protecting themselves from irresponsible or unethical use, will soon fall behind.

Digital adoption has a critical role to play in helping organizations maximize the value of their software investments and successfully engage with new and existing technologies. This includes in reducing risk to the organization, and in ensuring employers and employees can use technology effectively, efficiently, and with confidence.

We predict that in 2024, digital adoption will pass the tipping point to become a key aspect of the enterprise digital strategy. The number of organizations taking a mature approach to digital adoption and using DAP will rise, while the number of enterprises that don't prioritize all best practices will fall.

The benefits of this shift will be clear. Enterprises will see improved software ROI and boosted productivity as employees better utilize their digital tools across workflows. This will help them maximize the use of new tools, like AI, and put them on the path to reaching a state of HyperProductivity.



Visualize the state of digital adoption in your region. UK and Ireland -> DACH region -> Asia Pacific -> France -> wolk me Der Stand der Digitalen Adoption in DACH 12051 walk me Visualizing the state of digital adoption in the United Kingdom and Ireland Embracing a path towards HyperProductivity 2,051 employees 17 industries

About WalkMe

WalkMe (WKME) pioneered the world's leading Digital Adoption Platform (DAP) to drive enterprise productivity and reduce risk by ensuring consistent, responsible, and efficient adoption of software and the workflows it powers. Our Al-driven platform presides over an organization's tech stack, identifies where people experience friction, and delivers the personalized guidance and automation needed to get the job done, right in the flow of work. Customers like IBM, Nestle, ThermoFisher Scientific, and the U.S. Dept. of Defense trust WalkMe to create peoplecentric experiences that maximize software ROI and deliver the visibility required to effectively navigate the constant change brought on by technology. For more information, please visit our website at: www.walkme.com

Request a demo













































