



# The data that drives a winning sales tech stack.

A 5-step plan to driving a successful sales tech stack with a Digital Adoption Platform.



The way we sell has changed. From bartering, through digital sales - what used to be a door-to-door exchange now involves dozens of applications. Today, it's not good enough to be good at sales - a strong sales department needs strong digital skills.

Though the form of selling has evolved, the hurdles of cultivating the right tech stack to assure successful sales remains a core challenge. Sales executives are continuously challenged to establish a technology program that encompasses all of the right tools that will enable their teams to build strong pipelines, help sell more efficiently and accelerate deal closure.

To remain competitive, using software to streamline the sales cycle is no longer an optional extra—it's a business strategy. As a result, organizations are using an average of 14 different tools today just to manage the sales process end to end. Yet as business demands, deadline pressures, and knowledge gaps continue to pile up, success is only as attainable as a sales reps' ability to adopt these new technologies.



## Technology has become the challenge it was used to solve.

While managing business processes across the sales cycle, sales reps are occupied with keeping up with software changes rather than investing their time in prospecting, building pipeline, managing opportunities, creating quotes, and signing deals. Any investment in product proficiency overlaps with time spent on the actual job at hand.

<sup>1</sup>Gartner. 2018 "Magic Quadrant for Sales Force Automation."

## **Unintuitive software inevitably compounds the problem it was acquired to solve.**

With a myriad of applications, organisations are distraught by complex selling processes that spread out across dozens of applications. With so many tools in place, no wonder sellers are overwhelmed. According to the Harvard Business Review Analytic Services “The state of digital adoption for 2021” survey, over half of the respondents attested to interacting with 4 to 9 digital touch points in just one day while 30% pointed out they interact with 10 or more touch points in a single day.

Overcoming knowledge gaps and user experience challenges requires a tool that can pick up the pace when employees are off path - whether the employee is aware of it or not; a tool that meets sales reps exactly when and where they need it. This includes when they need a push to get started from the second they open up their CRM for the first time, or alerts along the way to make them more productive as they complete cross-application and data-sensitive processes - all of which impact the business’ bottom line.



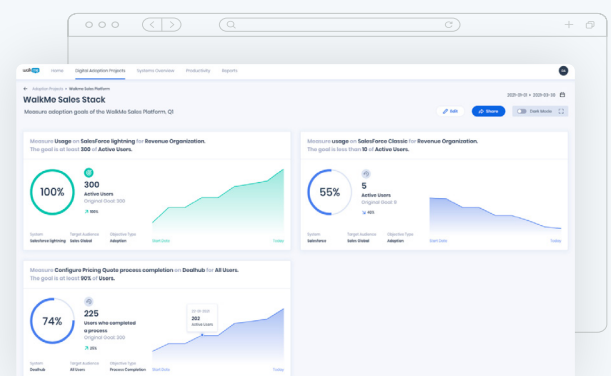
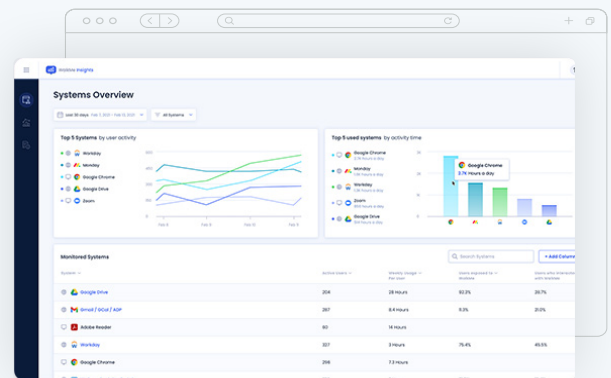
# Navigating successful digital transformation with a digital adoption platform

A digital adoption platform serves two sides of the map. From a business perspective, sales executives have the data and visibility they need to gauge how their reps are truly performing based on the software that they use and the business processes they compete; they have visibility into how their newest reps are onboarding and where the sales org struggles. On the other hand, Sales reps are no longer wasting time navigating unintuitive software, or keeping up with software change – so that they can focus on selling and ensuring they meet or exceed their quotas.

## A digital adoption platform for sales: a 5-step plan.

A 5-step plan to driving a successful sales tech stack with a Digital Adoption Platform:

1. Uncover software needs. >
2. Define your goals. >
3. Understand usage and points of friction using machine learning. >
4. Take data-driven action. >
5. Drive user experiences. >



# 1. Uncover software needs.

## Gain visibility into your sales tech stack.

The sales tech stack is increasingly growing, with the expectation to achieve higher productivity, revenue and greater business value. Yet, sellers are struggling to secure business goals while balancing multiple applications at any given point. When buying new software, sales executives need to understand the value they will achieve, and the ROI. When you acquire new software, ask:



What are the business goals this software will solve or drive?



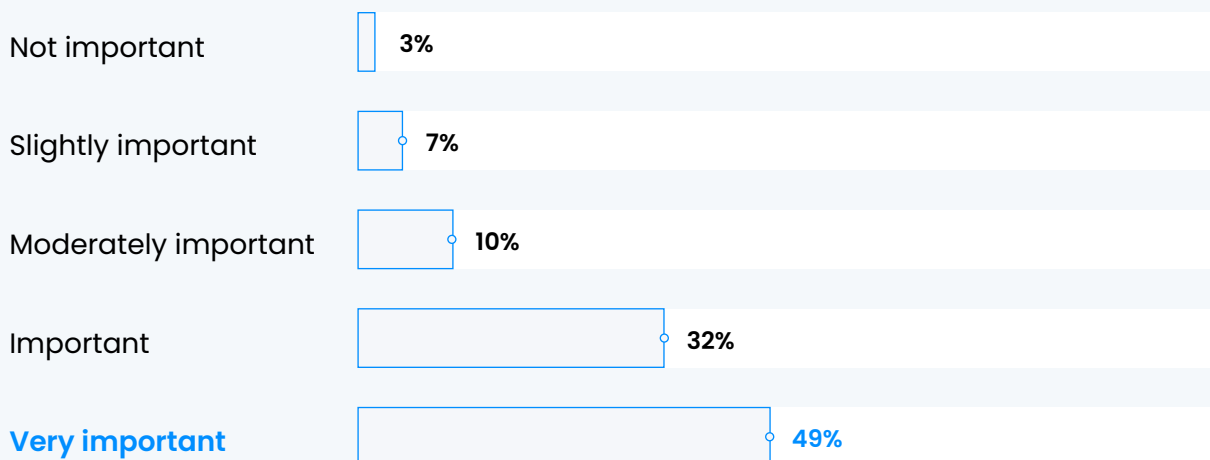
What is the productivity cost of introducing the new software?



How will we measure the effectiveness of the new software?

As you get started, it's important to map out your entire sales tech stack so that you can view spend, prioritize digital transformation initiatives, understand the impact of introducing new software, the business costs as well as the digital burden it can have on your sales reps. Visibility into digital adoption initiatives helps executives prioritize.

How important is it for your organization's senior management to have a **clear and complete overview** of your organization's digital adoption progress via analytics?



Source: Harvard business review analytics services survey, December 2020



# HITACHI

Hitachi Vantara uses WalkMe to drive digital adoption, boost sales productivity across technology stack.

[Learn more >](#)

## 7+

applications unified  
the sales experience

## 88%

increase in adoption  
rates of digital tools

## 86%

decrease in time spent  
on dedicated training



## 2. Define your goals.

### Setting digital transformation KPIs.

Without defining the right success metrics, sales executives cannot truly understand or measure their digital transformation goals or investments.

Why do organizations buy CRM or forecasting tools? What business goals are they solving for? 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 include:



User satisfaction



Application adoption



Process completion



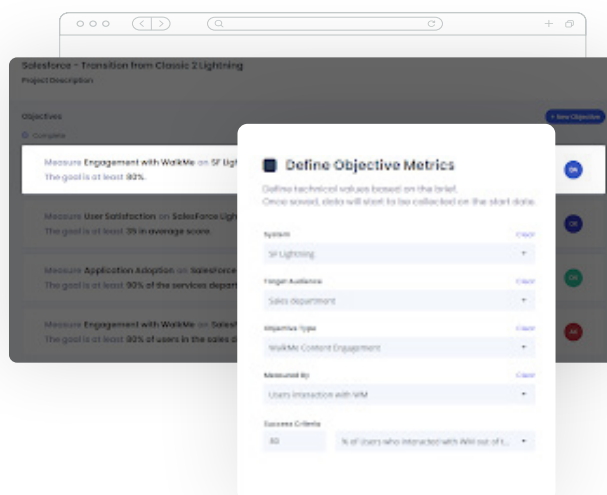
Training and onboarding

These goals are measured based on pre-defined KPIs which enable executives to measure the success of their digital transformation efforts. Common metrics include the percentage of satisfied or on-boarded users for the app, 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 Digital Adoption Platform provides business executives with the full set of tools and means to ensure digital transformation success - starting from the data needed to define and track digital transformation success.

Using WalkMe's Management Dashboards, sales executives can define and track business KPIs set to measure digital transformation from software usage through feature adoption.



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



How well employees are adopting the CRM application?

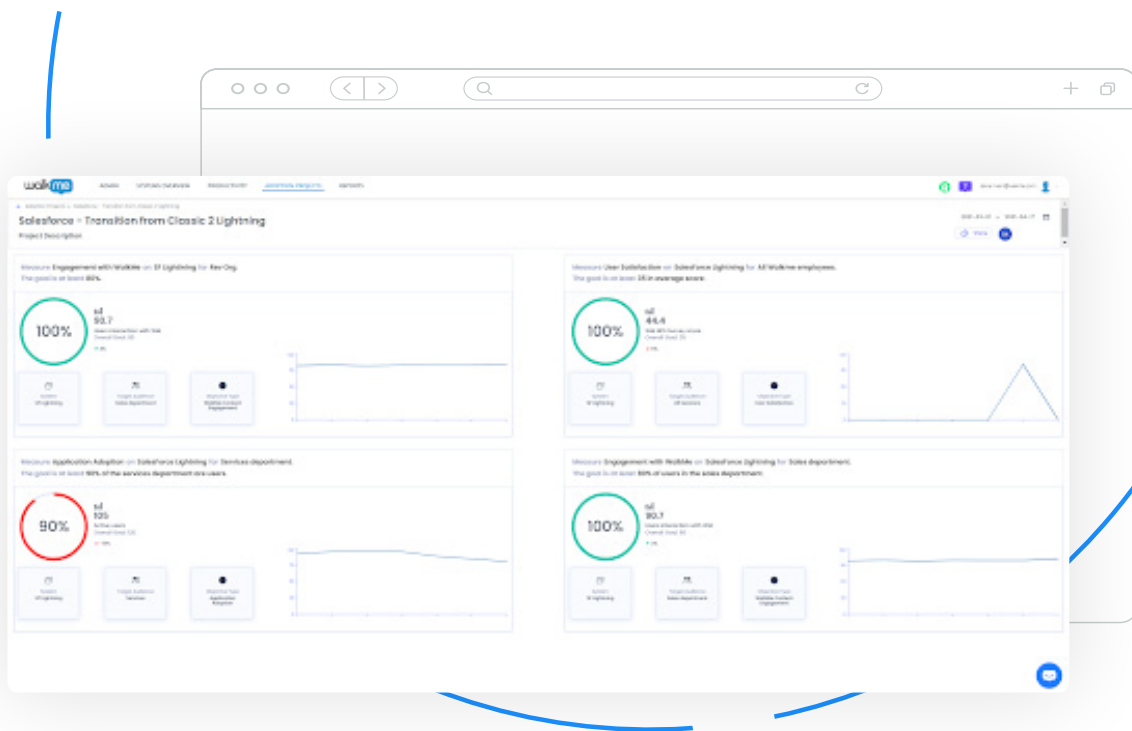


Cost and time spent on internal training and onboarding to the CRM?



How do employees actually complete in-app processes?

[such as converting leads to opportunities]



### Unsure what KPIs to set?

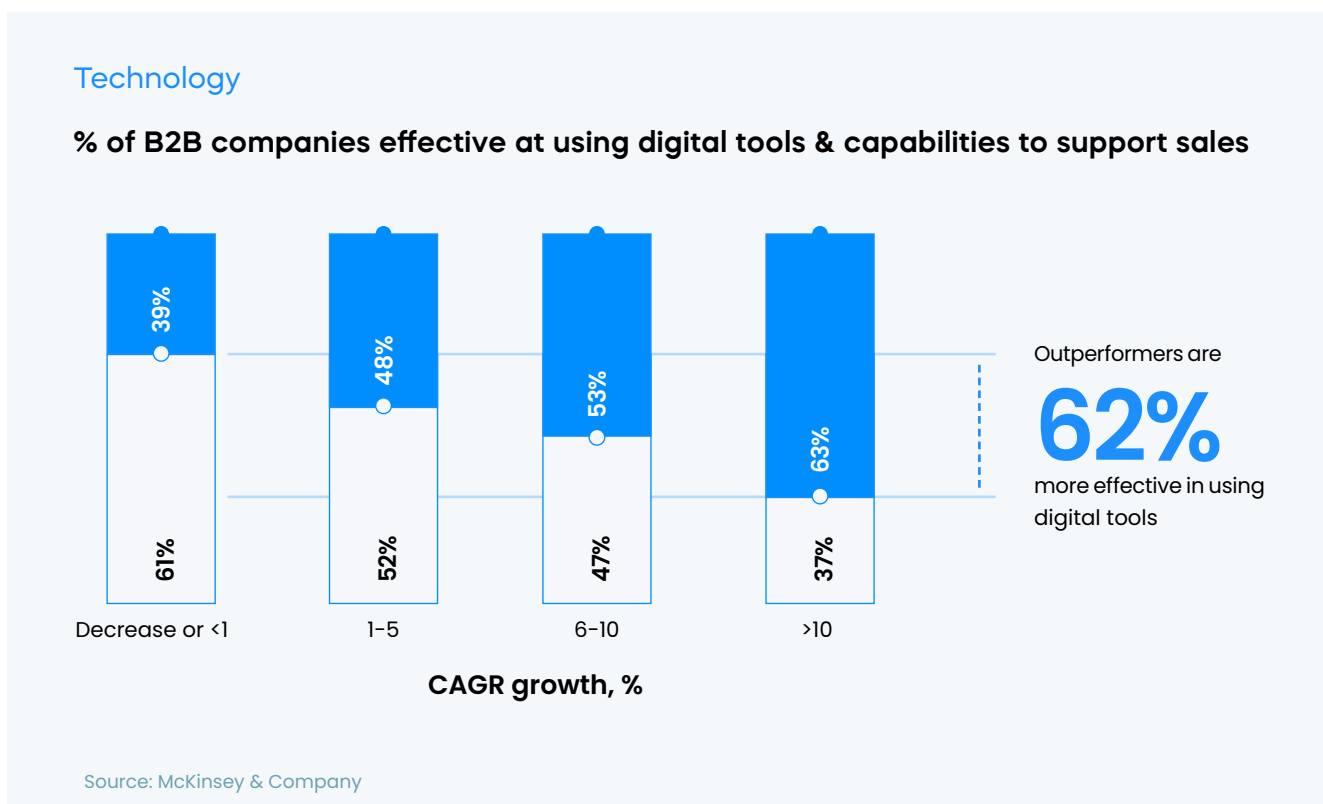
Get started instantly with WalkMe's predefined templates and solutions based on thousands of implementations across industries and proven best-practices.



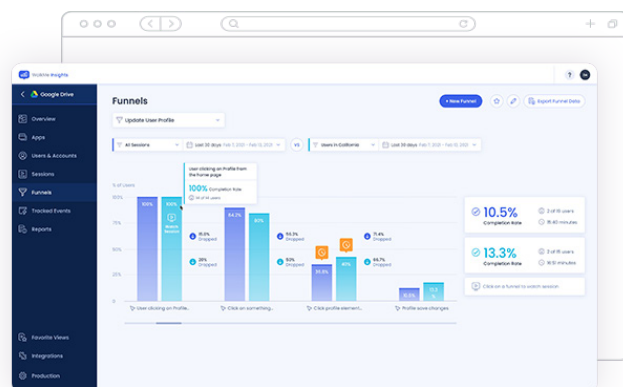
### 3. Understanding points of user friction with machine learning.

Connect business goals to experience.

According to [McKinsey](#), “the combination of smart tools and strong adoption translates to higher sales...While most sales organizations have plenty of digital tools. The problem is that their reps ignore them. Poor user interfaces, unclear use cases, or confusing recommendations condemn many would-be enablers to the trash heap.” Why is adoption so key to business success? Because outperformers are 62% more effective in using digital tools.

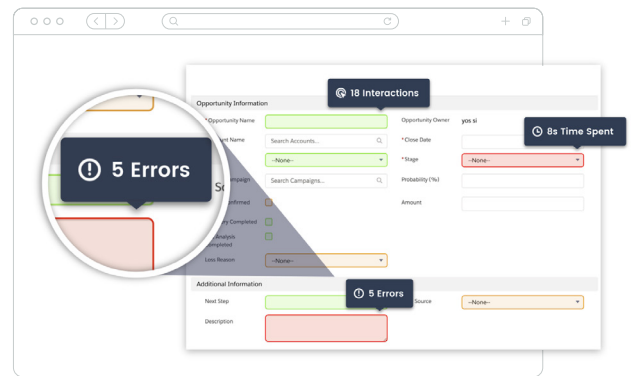


The essence of designing a user experience based on a data-driven approach starts with seeing how your application works from the perspective of employees. Once you’ve successfully laid out your digital transformation goals based on business needs, you’ll want to uncover and leverage more data to drive an employee experience that meets your business goals.



With WalkMe's Digital Experience Analytics (DXA) you can track engagement with your underlying applications and analyze user journeys so that you can uncover software adoption trends and challenges, see exactly where employees are dropping off in a process, analyze which new features are being adopted or not, and general behavior on any application.

Moreso, you can leverage machine learning and industry best practices to make actionable decisions based on data. WalkMe recently introduced UI Intelligence which identifies where employees have the most friction, high error rates, and inefficiencies in form fills - and most importantly, the action required to optimize workflows.



According to initial data gathered through WalkMe's UI Intelligence, 20% of users fail to complete a full form. Out of these, 90% of the failures are due to improper form completion, and 10% are due to incorrect data inputs. From a business perspective, over time, these errors can have major business implications. 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

## 4. Take data-driven action:

### Leverage data to compose experiences that drive business goals.

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. A digital adoption platform will rectify this by putting users first.

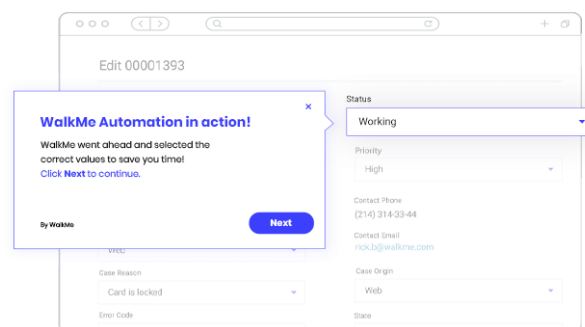
Data has little value if you don't know what to do with it. With WalkMe's code-free editor, leverage the data you've gathered across the tech stack and business processes to design experiences for employees using a suite of features to deliver guidance and drive engagement, productivity, and efficiency. Create content that is personalized to each type of user, and contextual to application and business processes – keeping your sales teams going regardless of website changes, browser updates, and platform version releases. Getting started is even simpler with ready-to-go templates from WalkMe's Solution Gallery.

## 5. Accelerate user experience:

### User experience is the driving force of your sales tech stack.

Your sales reps rely on their tech stack to do their job. 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."<sup>3</sup> In other words, your sales reps are too busy to learn new software.

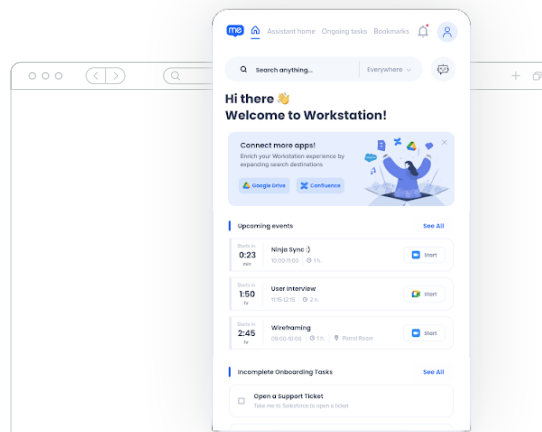
With the help of a digital adoption platform, your sales reps can continue doing their job, regardless of the underlying application they need to use. WalkMe's DAP is designed to leverage the user interfaces and behavior across applications with pre-structured and context-specific guidance.



<sup>3</sup>Futurum Research, An Enterprise Guide to Digital Adoption. 2021

By automating cross-application processes DAP can assure users increase their 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 business 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.”**



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

# The core process of making data-driven decisions:

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**Discover:** With WalkMe's management dashboards gain a full view into your software performance and usage across the entire sales tech stack.

**Analyze:** Measure, drive, and act to ultimately maximize the impact of your digital transformation strategy.

**Act:** Uncover actionable insights to be addressed with WalkMe content with a machine learning algorithm which understands forms in the underlying application.

**Experience:** Using automation and strategically-placed content, proactively guide and engage your employees to complete any business process across single or multiple applications across your tech stack—delivered at the moment of need.



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

Source: [Predicts 2021: New Selling Imperatives Drive CRM Sales Technology Roadmaps \(gartner.com\)](#)





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 a sales rep can not accurately maneuver their CRM to enter data accurately, and forecasting is consequently compromised, the value has not been achieved. If users are immediately able to leverage new and existing software as intended, then the successful user experiences will enable organizations to realize the value of their 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.



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## 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](http://www.walkme.com)

**WalkMe is successfully deployed on:**

