



Solution Brief: WalkMe for Sales

Turn CRM users into sales outperformers.



WalkMe for Sales gives you the data needed to see who is using CRM and other sales apps and how, as well as the ability to course-correct on the fly using in-app guidance, engagement, and process automation. Streamline the process from lead to value, optimize experience and boost performance – including time-to-competency.

Digital sales tools such as CRM apps have revolutionized the selling process, contributing to a vast wealth of data and potential.

However, technical challenges and knowledge gaps lead many sales professionals to resist using these tools as intended, failing to capitalize on their promise. Time spent navigating multi-step tasks, flawed workflows, and incomplete data lead to seller inefficiency, inaccurate sales forecasts, and missed sales.

Put simply, 'smart' tools have become the problem they were intended to solve. Until WalkMe.

WalkMe takes the struggle out of CRM.

[According to Mckinsey](#), 'the combination of smart tools and strong adoption translates into higher sales...sales outperformers are 62% more effective in using digital tools.'

WalkMe maximizes your revenue potential and gives your sellers the real-time support they need to navigate business-critical CRM software with ease and accuracy.

WalkMe maps user behavior letting you see who is using CRM applications and how. With this level of visibility, you can identify the friction points – even before they happen – that prevent sellers from leveraging this critical selling tool to its full potential. Using insights derived from this data, you can make informed decisions and create the user experiences that will increase sales rep performance.

With WalkMe's patented core technology and no-code editor, you can implement self-service features including in-app guidance, process automation, data validation, and process visibility making any CRM software user-friendly. Read on to learn about each of these functions and how WalkMe customers are leveraging them to accelerate onboarding and ramp-up time, improve sales forecasting with accurate data, and increase seller efficiency to close more deals.



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

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



In-app guidance accelerates time to digital proficiency.

WalkMe's contextual, personalized guidance accelerates onboarding and digital adoption, cuts time-to-competency for your new sales reps, and creates self-sufficient sellers. Providing knowledge-based resources and intuitive support to your sales reps at the immediate moment of need boosts their proficiency and digital skill retention.

Process automation ignites seller efficiency.

WalkMe's powerful automation features consolidate complex, multi-step, and repetitive sales processes to streamline your operations and increase seller efficiency. Proactively surface business indicators to finetune your sales operations, effectively reduce average time spent, and increase task completion rates.

PAYCHEX

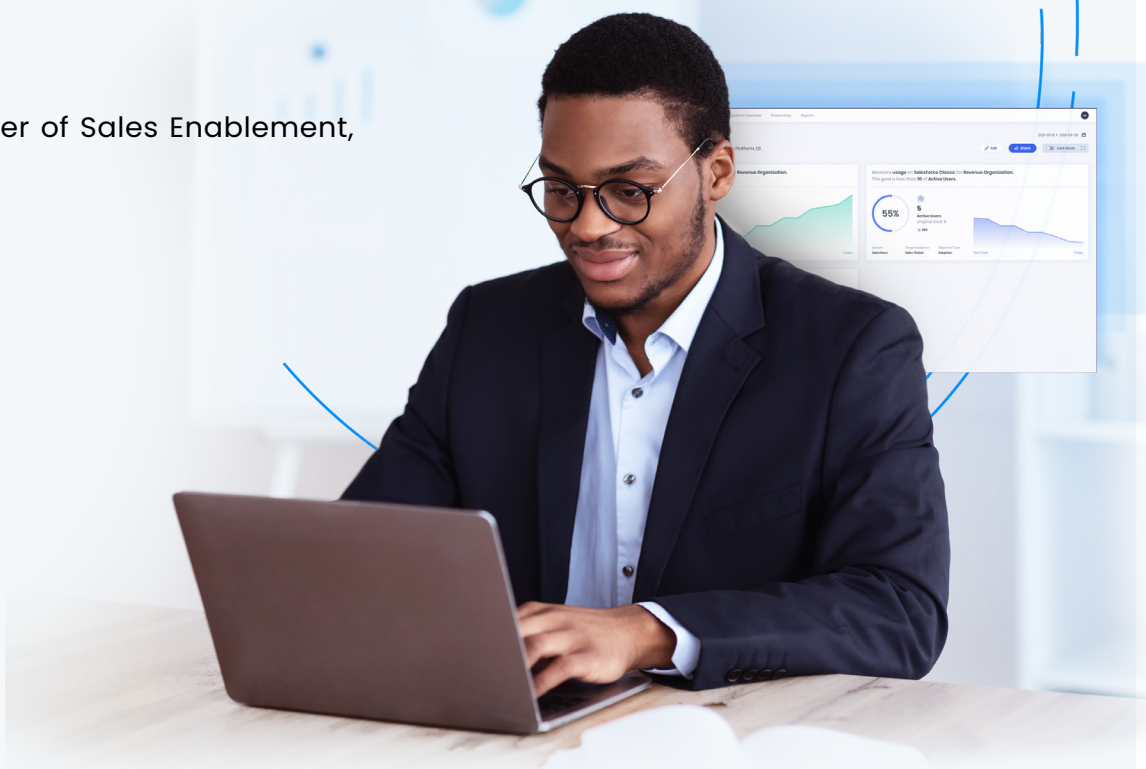
Paychex seamlessly migrated 3,500 users to Salesforce Lightning® in 6 months, saving \$400,000 in sales help desk headcount required to support the transition.

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WalkMe really has given us the ability to launch bigger and wider projects in Salesforce and feel more confident with every launch.

Jane Bach

Senior Manager of Sales Enablement,
Paychex



Data validation safeguards for accurate forecasting.

WalkMe's guidance and automation paired with timely data validation tools ensure successful task execution. Engage your sellers to complete desired actions and proactively detect and correct data entry errors before they happen guaranteeing the collection of up-to-date and accurate data you need for improved sales forecasting.

Visibility to identify friction points and fractured workflows.

WalkMe's robust diagnostic analytics provide you with a visual representation of user behavior for the swift identification of friction points and fractured workflows. Take action on these insights with a no-code editor seamlessly layered on top of any CRM application to ensure an optimized user experience and realize your CRM software's full potential.



Instead of waiting on IT to conceptualize a fix, I am able to build out a WalkMe solution in a matter of hours; we're able to deploy a simple, yet elegant solution to encourage reps to use specific naming conventions — resulting in a 2000% increase in [accurate] documentation.

Michele Giacomuzzi

Manager, Sales Enablement, Thermo Fisher Scientific

Extend the value of WalkMe across your organization.

Don't stop at CRM. WalkMe's Digital Adoption Platform gives you visibility across your tech stack and the insights you need to measure, drive, and act to ultimately maximize the impact of your digital transformation strategy.

To learn more about the value of WalkMe's Digital Adoption Platform, [click here](#).





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:

