walkme

The data that drives a **winning sales tech stack.**

A 5-step plan for building a successful sales tech stack with a digital adoption platform

Maximizing the value of mission-critical applications needs to be a strategic business-priority for any sales organization. But with more than a third of digital investments going towards projects that don't meet their stated goals, it's clear that for many organizations, technology isn't being optimized.

Today, the average seller uses 14 applications every day to manage the sales process end-to-end. Coupled with the fact that enterprises are adding as many as 17 new pieces of software every year to their tech stack, it's clear that managing technology has become a job in and of itself.

According to WalkMe's State of Digital Adoption 2022–2023, 55% of enterprise leaders say that their employees lack the digital dexterity to use applications effectively, a factor that contributes heavily to the nearly $100 million in additional costs organizations incur annually.

Navigating successful digital transformation with DAP

Getting the most out of your digital assets requires a user-centric approach that prioritizes seller digital dexterity and improves cross application workflows. Digital adoption platforms (DAP) allow you to evaluate current processes, identify areas of improvement, and design experiences to increase adoption.

For sales managers, this means gaining visibility into software to gauge how reps are performing, friction points they encounter, and their completion rates. Sales reps receive contextual and personalized in-app guidance to ensure proper utilization and the quick adoption of new workflows, including product releases, UX changes, and new feature rollouts.

The Sales Ecosystem

Customer expansion
Digital signing
Invoicing
CRM
Prospect engagement
Forecasting tool
Internal knowledge base
Quoting tool

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. Maximize software ROI. ›
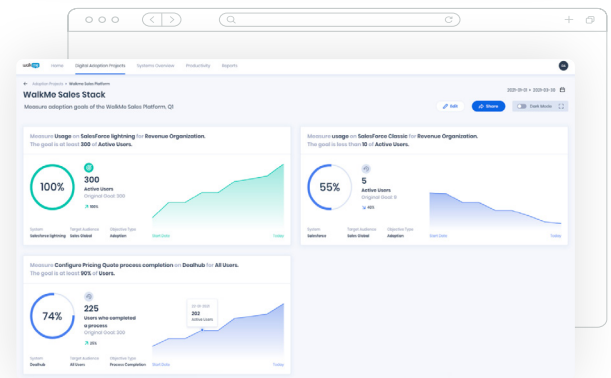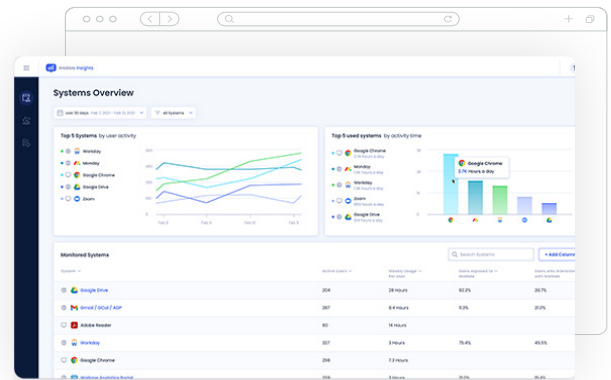
1. Uncover software needs.
Gain visibility into your sales tech stack.

The sales tech stack is increasingly expanding, 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 and ROI they expect to achieve. When you acquire new software, ask:

What are the business goals this software will solve or drive?
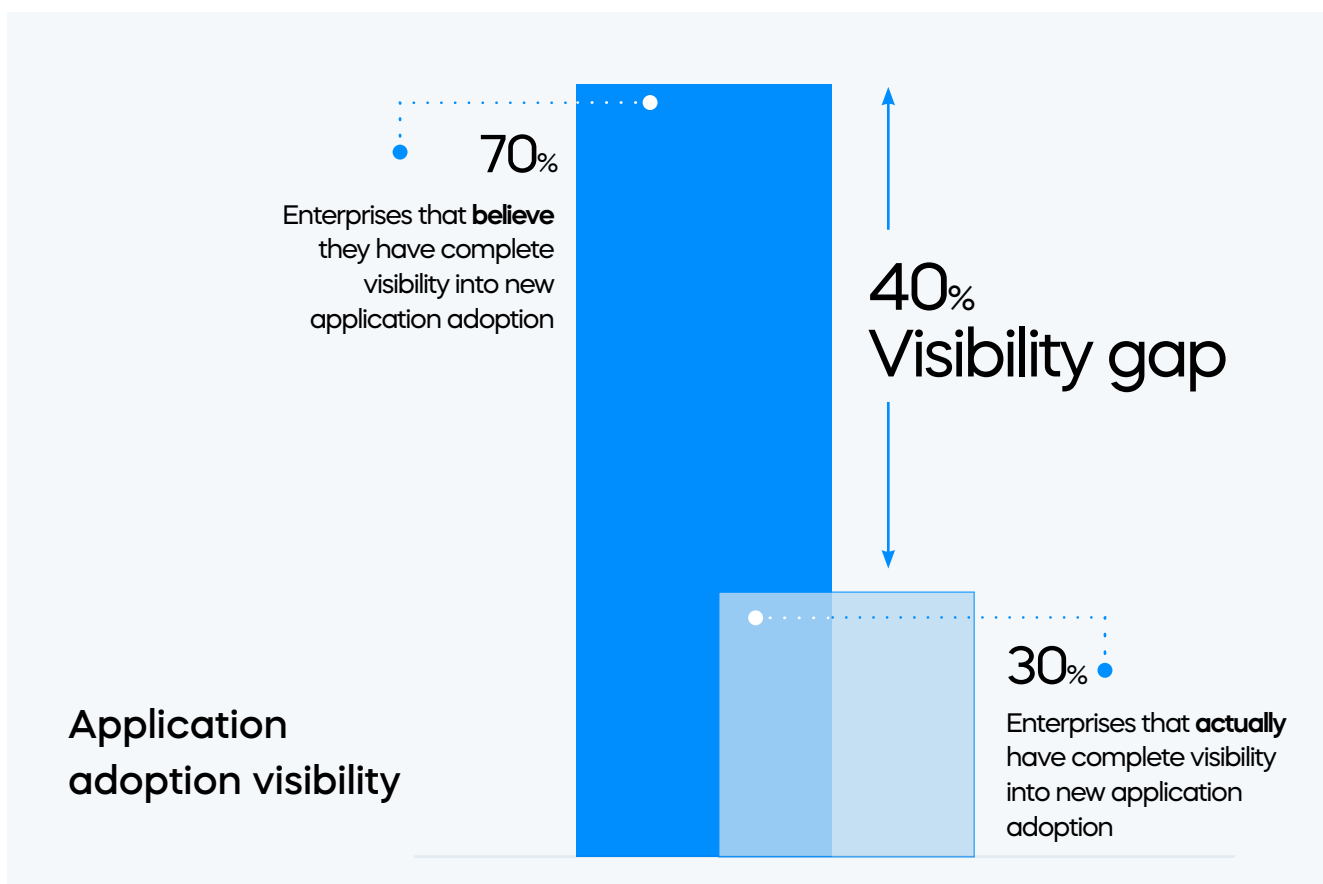
What is the productivity cost of introducing the new software?

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.

70%

Enterprises that **believe** they have complete visibility into new application adoption

40%
Visibility gap

Application adoption visibility

30%

Enterprises that **actually** have complete visibility into new application adoption

ThermoFisher
S C I E N T I F I C

Thermo Fisher Scientific is a digital innovation leader, helping its customers advance science and technology. Thermo Fisher faced tech challenges of its own: many sales reps struggled to use Salesforce® effectively and consistently, resulting in a high volume of support tickets and an unorganized database. The company also needed a tool to improve its change management strategy for communicating new features and updates.
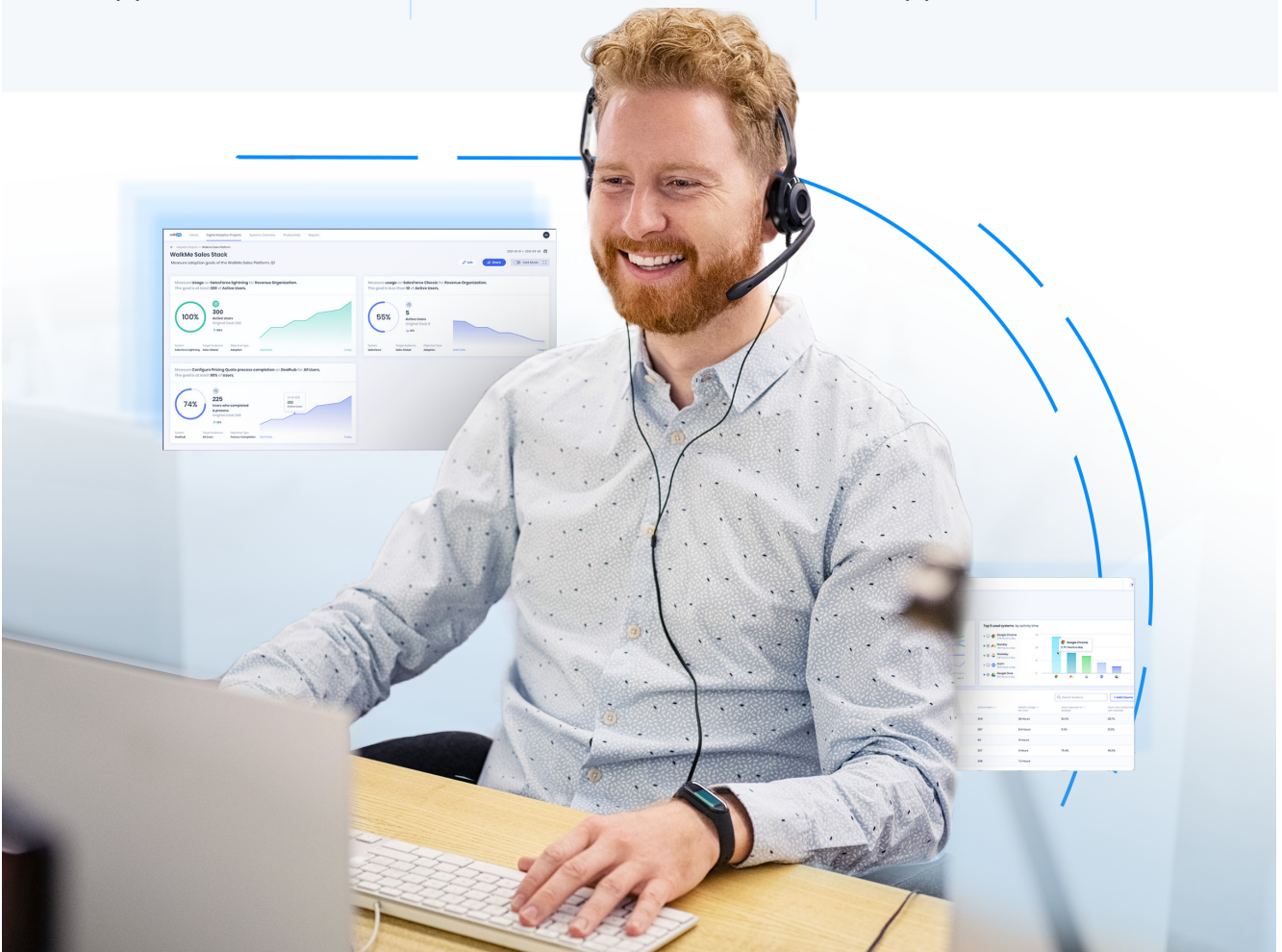
Learn more ›

20%
reduction in Salesforce®-related support tickets

2-3H
per day saved for users

83%
of users rely on WalkMe for ongoing training and support

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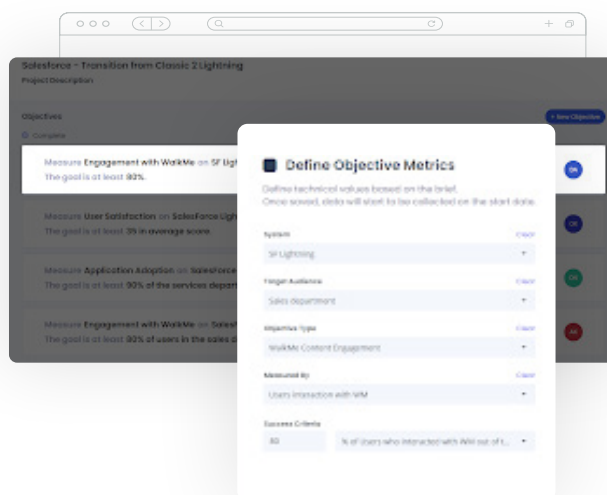
In this example we see how to measure a migration from Salesforce® Classic to Salesforce® Lightning. While goals set vary by organization, the primary goals we see which accompany any CRM adoption strategy are:

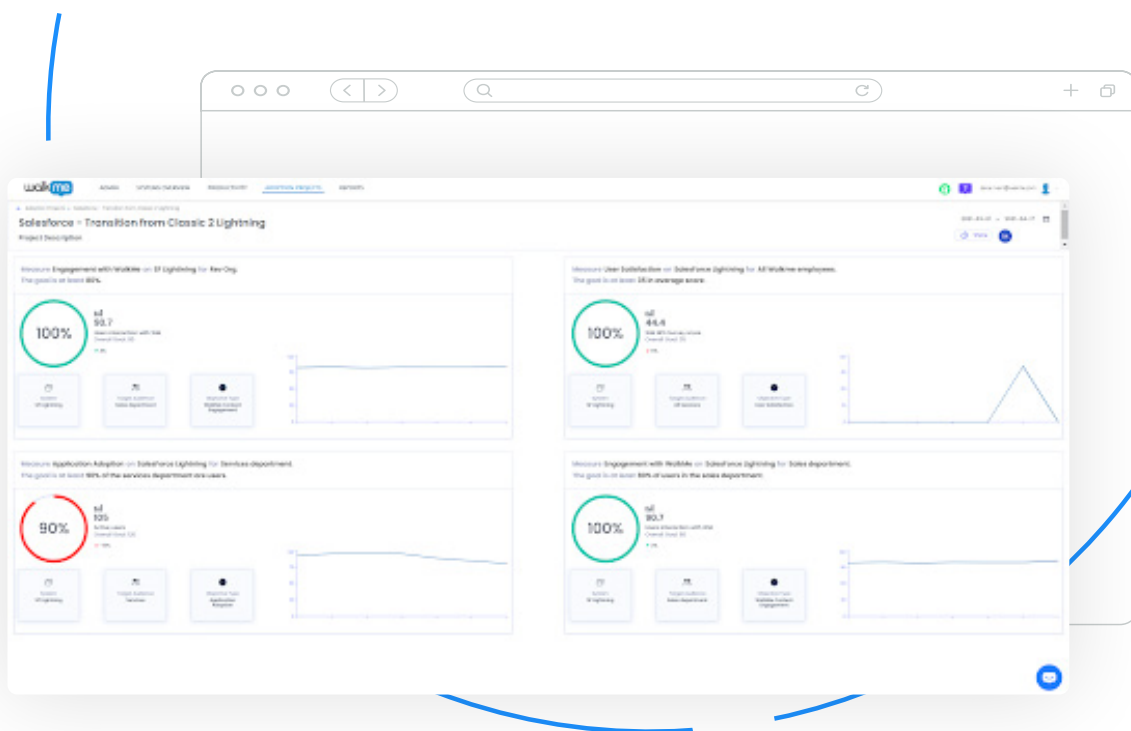How well employees are adopting the CRM application?

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

How do employees actually complete in-app processes?
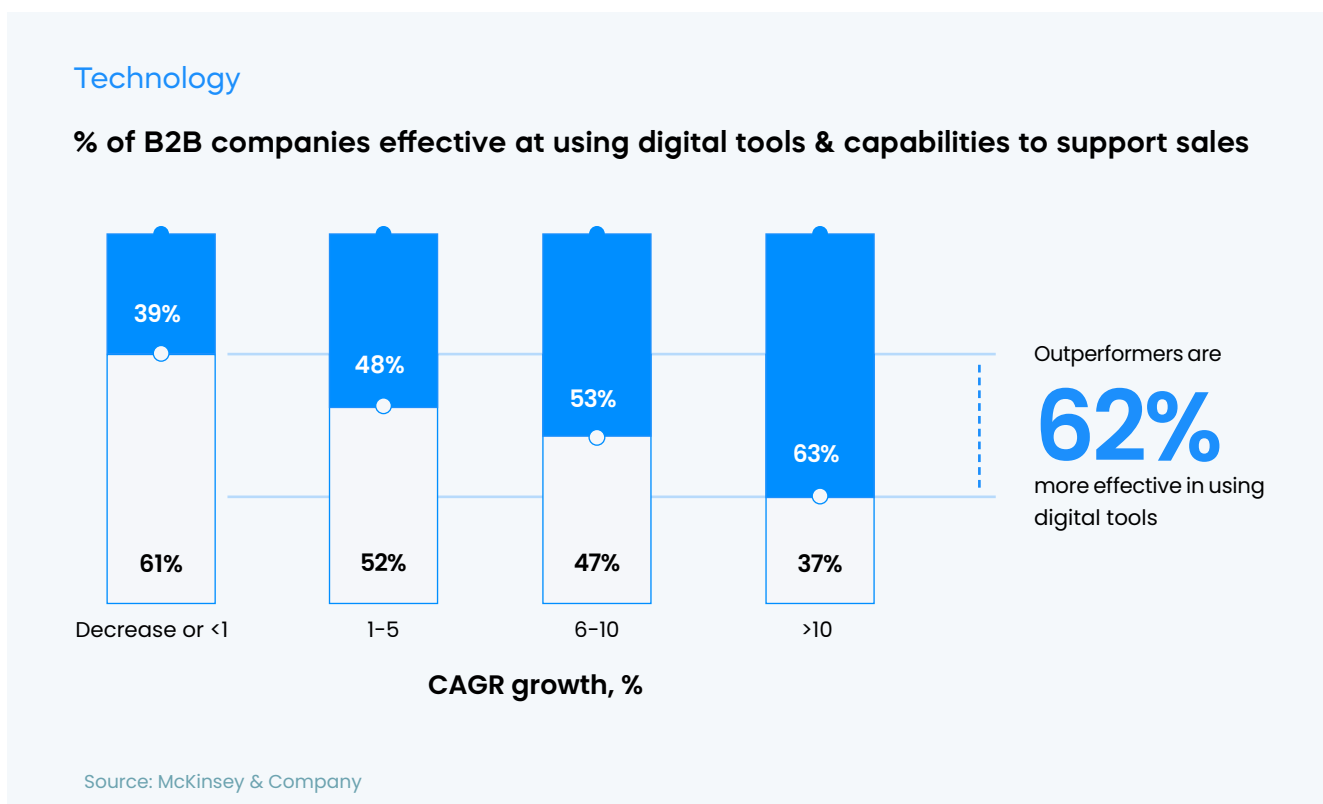
[such as converting leads to opportunities]

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.

Technology

% of B2B companies effective at using digital tools & capabilities to support sales

Decrease or <1	1–5	6–10	>10
39%	48%	53%	63%
61%	52%	47%	37%

CAGR growth, %

Outperformers are

62%

more effective in using digital tools

Source: McKinsey & Company

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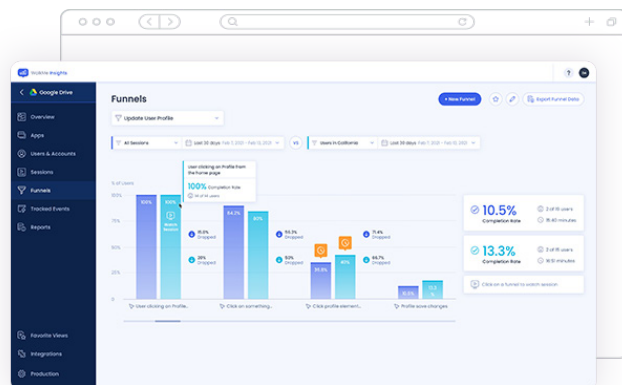
With WalkMe's extensive data offerings you can track engagement with your underlying applications and analyze user journeys so that you can uncover software adoption trends and challenges, see exactly where employees are dropping off in a process, analyze which new features are being adopted or not,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

Moreso, you can leverage machine learning and industry best practices to make actionable decisions based on data. WalkMe's UI Intelligence identifies where employees have the most friction, high error rates, and inefficiencies in form fills - and most importantly, the action required to optimize workflows.
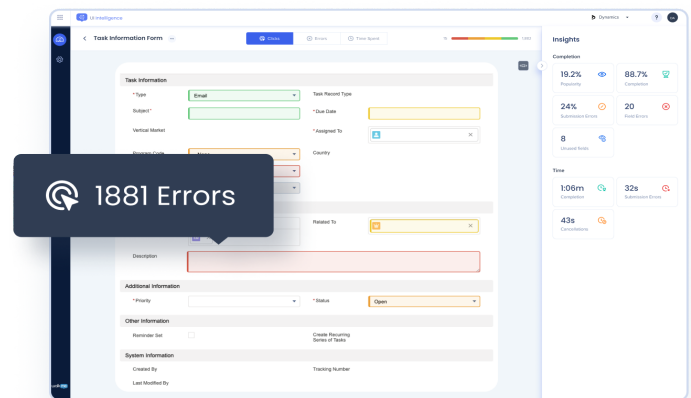
According to WalkMe data, 70% of fields in New Lead forms go unused, and 45% of those completed have errors due to incorrect data inputs. From a business perspective, over time, these errors can have major business implications. From an employee efficiency and productivity standpoint - it takes employees 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.

Data has little value if you don't know what to do with it. With WalkMe's low-code 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.

Additionally, WalkMe provides content that is personalized to each type of user and contextual to application and business processes - keeping your sales teams going regardless of UX changes, software updates, and platform version releases.

Getting started is even simpler with ready-to-go templates from WalkMe's Solution Accelerators. These preconfigured platform-specific solutions addressing the top business processes fast-track the deployment and value of your WalkMe solutions.

5. Maximize software ROI:

## Derive more value from your mission-critical apps.

With 60% of decision makers saying that poor end-user adoption negatively impacts digital ROI, prioritizing a user-first digital strategy is essential. Realizing the full value of your sales software requires giving reps the tools they need to quickly execute cross-application workflows and get back to interacting with customers face-to-face. To that end, adoption and automation need to be top-of-mind when building out your tech stack.

WalkMe's DAP provides in-app support and guidance, giving your reps on-demand information to complete critical tasks required from lead to close. Meanwhile, task automation allows for increased data accuracy to further streamline business processes.
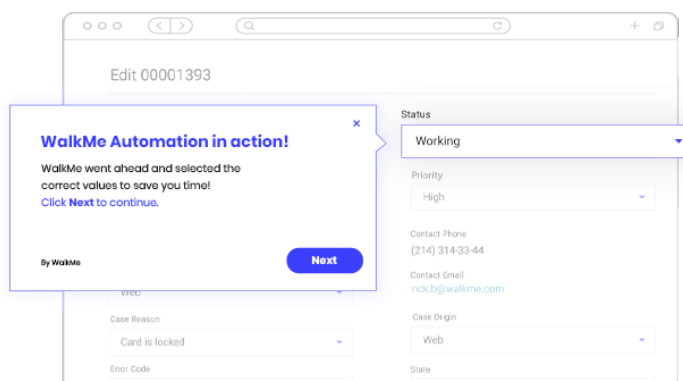
As a result, your organization will benefit from:

- **Reduced onboarding time –** Embed training within the flow of work to eliminate the need for costly in-person instruction while accelerating time-to-competency. Enable sellers to ramp up and get to work faster.
- **Optimized change management –** Targeted notifications enable business teams to push updates in real time, streamlining the way sellers interact with changing software.
- **Improved support efficiency –** Immediate access to self-service support across applications reduces the burden on your support teams while providing actionable insights into user friction points.
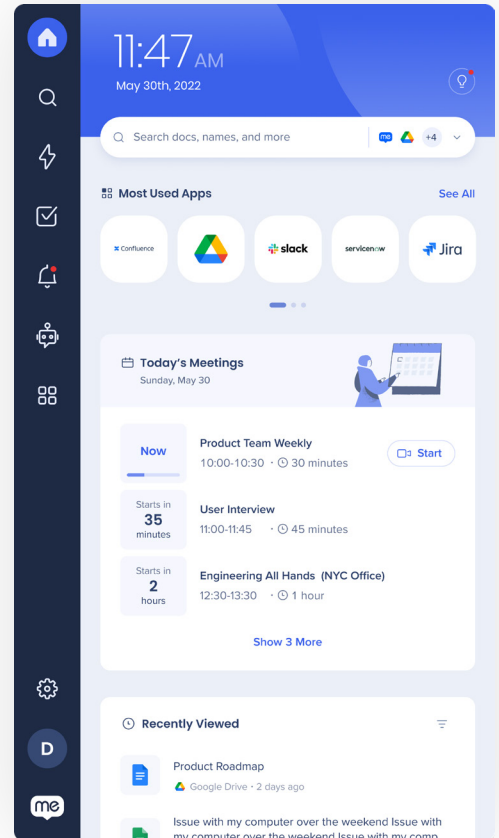
All of this ensures that sellers are leveraging their software to its full potential without being weighed down by repetitive tasks that prevent them from their real job – selling.

sprinklr

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:

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 reps 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.

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 low-code platform leverages 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: