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The Best Way to Attain 100% Usage of Enterprise Applications: Digital Adoption Solutions

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Over $430 Billion is Spent on Enterprise Software, Just For It To Be Underused.

Your guide to building a better digital experience for your employees

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Introduction

The rapid acceleration of digital technology innovation has provided hundreds of solutions for businesses. Thes solutions, when used correctly, can skyrocket enterprises' efforts to improve efficiencies, organize workflow, reduce costs, enhance customer experience, and scale organizational growth more effectively.

Because digital technologies can be so instrumental in organizational growth, 57% of CEOs are intent on building up technology and digital capabilities to gain a competitive advantage, **according to Gartner**.

What does that mean in terms of revenue? **Gartner** predicts that worldwide IT spending will increase by more than six percent this year to total $3.7 trillion, and enterprise software spending alone is growing most rapidly and forecasted to increase by over 11 percent.

While CEOs see the value of digital technology solutions, and while companies are investing a significant portion of their budgets into these digital solutions, stats from McKinsey & Co. show that 70% of **change initiatives** are failing more often than succeeding.

This presents a significant conundrum. Enterprise leaders understand the unprecedented value new digital solutions can provide to organizations, but they can only capture the value of those new technologies if employees learn how to use them properly.

Since scaling back on technology investment isn't a strategic option, the only other option is to find a way to improve the adoption of digital technologies.

Enter Digital Adoption Solution.

This white paper addresses the newly recognized technology—Digital Adoption Solution (DAS)—and explains how DAS helps teams at enterprises successfully integrate critical software programs and capture the full benefits of the software that are so vital to the success of your business.

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Chapter 1

## Current State of Affairs in Enterprise Software

57% of organizations say that integrating key digital technologies is critical to enabling their digital business. However, turning this priority into a reality is grim when you look at the current state of affairs in enterprise software in detail.

Enterprises Face Astoundingly Low Digital Adoption Rates

The infographic below provides insight into the challenges organizations are facing with successful digital implementation and how it is negatively impacting business.

70% of change management programs fail (McKinsey)
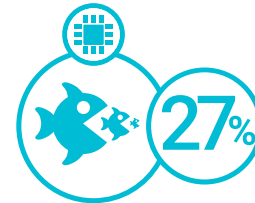
27% of executives rate digital transformation as a matter of survival (Advance 2000)
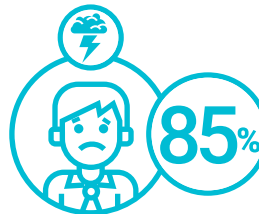
85% of Business Executives consider getting staff to adopt technologies is a big challenge (Intelligent Bus. Research Svcs)

93% of Companies continue to spend on underused Software (Flexera)

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Sales Management performance is also impacted by Poor Seller Adoption

Based on this infographic, one thing is clear: companies are investing in the right software tools to boost business, but the systems of implementation aren't intuitive enough for employees to successfully adopt the programs. In summary, the current state of enterprise adoption is bleak. Let's dive deeper into more reasons why.

< 46%
of sellers use their company's CRM (CSO Insights)
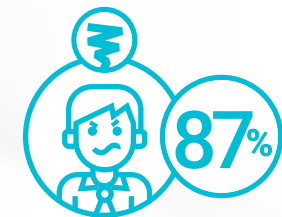
87%
of sellers are not satisfied with their CRM system (HubSpot)

CRM 70%
of CRM implementations fail to achieve their expected outcome (Elsevier)

55.8%
of Sales managers are measured on how well their team adopt CRM;*

* 11.6% of those managers are also compensated based on adoption (CSO Insights)

The Elephant in the Room: 4 of the Top Barriers to Successful Software Adoption

With **$431billion** spent on enterprise software in 2019, and over 50% failed digital transformation initiatives last year, it's important to ask one critical question. Where is the disconnect?

Based on industry research, there are four main contributing factors to unsuccessful software adoption, including lack of user technical proficiency, employee resistance to software adoption, the complexity of technologies that enterprises are anxious to implement, and the fact that employees are expected to use several apps each day. Here is a closer look at each of these challenges.

1. Lack of Employee Technical Proficiency

Members of Generation Z are considered to be the **most tech-savvy generation** in the workforce. However, chances are the majority of your employees were born before 1996. While your talent pool at work is skilled and experienced in many ways, your employees may not be naturally adept when it comes to integrating new technology to solve business problems. Many employees are not even digitally proficient enough to use Office 365, let alone experience true success with more complex apps like Salesforce, Oracle, and more.

Older generations in the workforce are prone to using traditional, yet outdated, methods of carrying out business processes, and this contributes to low adoption rates of new business software solutions.

2. Employee Resistance.

Not only do many employees lack technical proficiency, but it's also commonplace for employees to resist change in the workplace, especially when new practices involve implementing complex software programs.

Without a proper change management plan, top-of-the-line software training, management support, effective communication, helpful feedback, and ongoing support, software adoption rates will remain low, and employees will revert to old, outdated business practices. Employee resistance to integrating new software is just one explanation of why **70% of change management programs** fail.

3. Software is Increasingly Complex.

Another problem with successful software adoption is technology, ironically, is much more complicated than it should be, is designed by software engineers (who are not business users) and hence designed without the everyday business user in mind.

Take Salesforce, for example. Salesforce is an integral customer relationship management solution that over **150,000 companies** use. In summary, Salesforce is helpful because it offers all your departments (sales, marketing, commerce, service, etc.) a comprehensive view of the customer to help everyone get on the same page.

While Salesforce is a staple for most companies, it's also convoluted. There are Salesforce products for sales, service, marketing, commerce, engagement, platform, integration, analytics, enablement, productivity, and more. Each product has multiple features and functionality is cumbersome. Salesforce is so complex, in fact, that firms often hire a Salesforce consultant to help them enhance their use of the software

Salesforce isn't the only complex software on the market. Most enterprises use several software programs daily to conduct business effectively. However, as noted by the infographic above, software adoption rates are astoundingly still low, and digital transformation failure rates are high.

Buying into a software solution is the first step in streamlining business processes, but the increased complexity of technology is limiting enterprises' ability to make operational progress.

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4. Too Much Technology Thrown at Employees

According to **Herbert Simon**, "a wealth of information creates a poverty of attention." This is the perfect explanation of the problems employees experience during their digital journey at an organization.

One-third of companies spend an average of over **5% of their annual revenues** on technology, according to respondents in a Deloitte study, and employees are expected to use each robust technology. However, when there are a wealth of technologies that employees are expected to use, it can be so overwhelming that the employee has no idea where to focus their attention.

Consider an HR employee as an example. HR employees have a lot on their plates and have to use a slew of applications to complete their jobs successfully. This can include anything from a Human Resource Management System (HRMS), a Human Resource Information System (HIMS), a Human Capital Management System, a Core Human Resource Management System (Core HR), HR analytics, payroll software, etc. Not to mention, HR professionals may also need to be familiar with other software programs other departments use to complete business functions. Leading HCM applications like
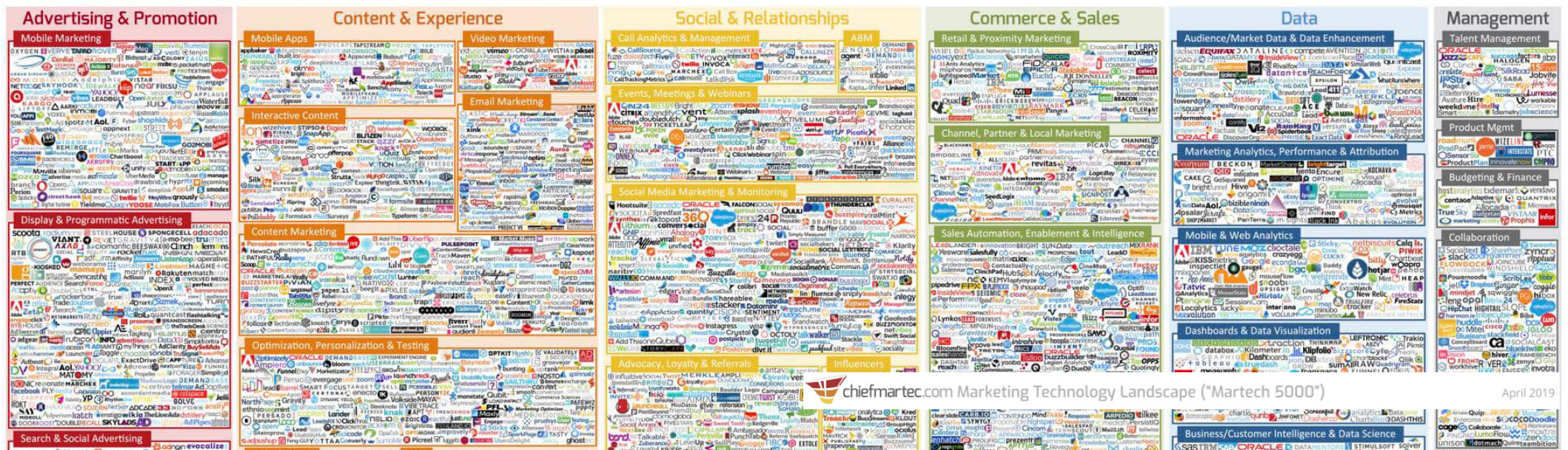
Workday release hundreds of features every 3-4 weeks that ends of confusing their users about the right process and add tons of work application leaders and Learning & Development teams for ongoing change management and training content creation.

It's not just HR employees that are overwhelmed. The image below shows the whole spectrum of applications that an employee could go through for each business function.

There are so many business solutions for different roles that it can cause confusion and technostress at the workplace. This comes with negative consequences, including:

- **Addiction to technology is contributing to a societal dearth of sleep.**
- **33% of U.S. workers report that they have missed work because of workplace stress.**
- **Introducing new technology is a well-known contributor to workplace stress.**
- **Healthcare for stressed workers also costs companies 46% more than average.**

Not only is technostress overwhelming, but, without proper support, it's also impossible for any employee to effectively learn how to use a slew of applications.

chiefmartec.com Marketing Technology Landscape ("Martech 5000")   April 2019

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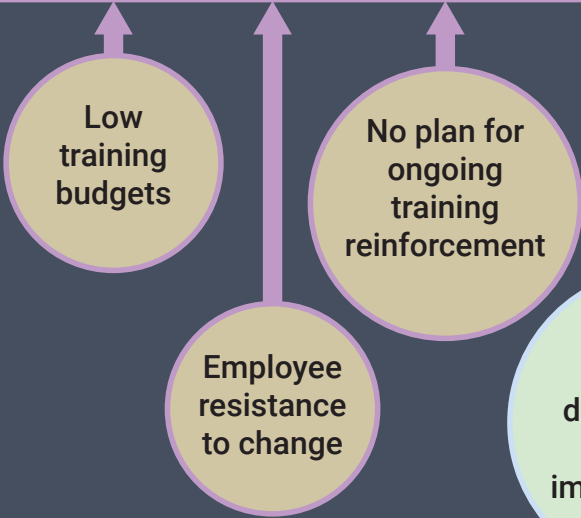**whatfix**

The Core of the Problem: Training & Support

While enterprises can change the type of software they purchase and the amount of software they choose to implement, digital adoption won't happen if problems with training tactics and software support are not addressed.

To understand this idea better, here is a deeper look into the three current stages of software implementation.

3 Stages of Software Implementation

1 **Pre Go-Live Stage**

2 **Go-Live Stage**

3 **Post-Go-Live Stage**

The pre-go live state consists of the time before your enterprise starts using new software.

The go-live stage for software implementation is the time when the new system is officially and formally available to employees to use.

The post-go-live state is the time after the software has been implemented and is officially part of the new workforce processes.

- Low training budgets
- Employee resistance to change
- No plan for ongoing training reinforcement
- Focus on meeting deadlines, not proper implementation
- Problems with training
- The onboarding process is poor
- Employees forget training
- Checklist approach
- No reinforcement learning
- Training is not streamlined
- No means of measurement
- Users fall back to old patterns

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3 Stages of Software Implementation, Training, & Support

Going live with your new software program can be a high-stress transition for any enterprise. To be successful, it requires a heavy investment in company-wide training (sometimes across the globe), a willing and tech-savvy workforce, a plan for retention and ongoing support, and a system to measure successful adoption rates.

Unfortunately, most enterprises find this process more challenging and run into several "go-live pitfalls." Here are some of the most common problems you may recognize during each stage of software adoption.
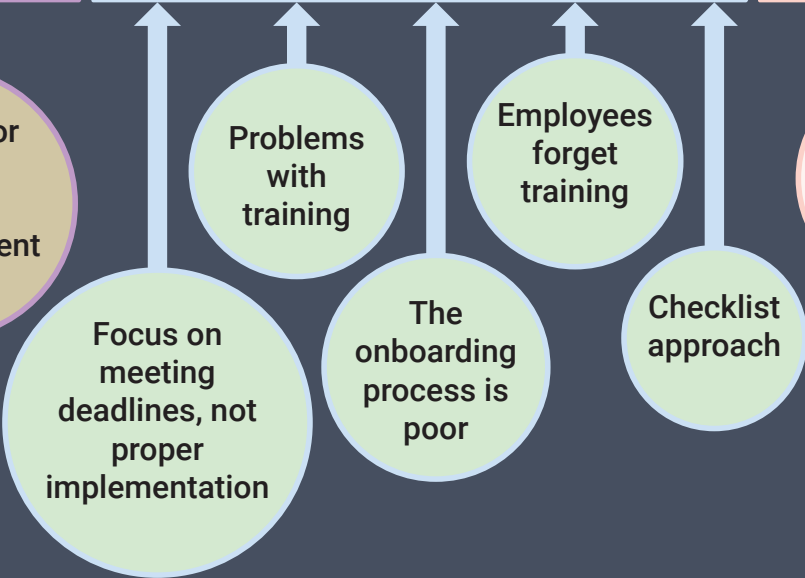
1. Pre Go-Live Stage

The pre-go live state consists of the time before your enterprise starts using new software. This phase consists of research, planning, and skilling-up employees on how to use the new software at work.

Implementation time can vary, depending on the software and organization, but the time leading up to implementation takes about 3 to 6 months on average. During this time, organizations encounter several pitfalls, including the following:

▷ **Low training budgets.** To successfully implement new software, experts recommend **investing a third** of the overall budget to training. As it stands now, there is a low budget allocated to training and adoption activities as compared to the license fee (just 1%).

▷ **Employee resistance to change.** Users are forced to learn new software and change their practices at work without explaining "why" they should and "how" they will benefit. This can lead to employee resistance and users reverting back to their old ways.

▷ **No plan for ongoing training reinforcement.** Most enterprises don't have a plan for reinforcing the training on an ongoing basis. Without ongoing support, most implementation efforts will fail. Most employees attending such training don't pay attention during training as they are easily distracted by tactical urgent priorities e..g closing a deal, responding to that customer email etc. Employees mistakenly assume they will go back to the training material after and brush up on knowledge when they actually start using the new application. However, in reality when employees are in the flow of doing the actual work and at their moment of need, they can't find that training document or don't find it very useful, or don't know how to make the leap from a recorded LMS or PDF guide to their work inside the live application.
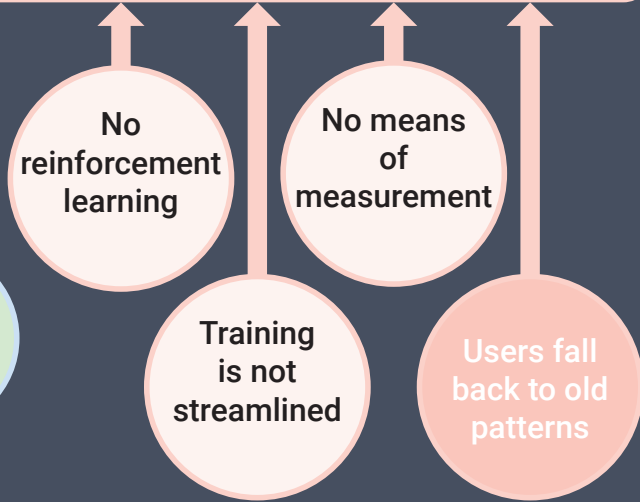
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2. Go-Live Stage

The go-live stage for software implementation is the time when the new system is officially and formally available to employees to use. They can start initiating transactions in the new software program (CRM, ERP, HCM, financial system, logistics systems, marketing systems, etc.).

Enterprises are not immune to pitfalls during the go-live stage either. Common problems organizations experience include the following:

▷ **Focus on meeting deadlines, not proper implementation.** Organizations often focus on meeting their go-live deadlines, and not on proper implementation. This translates into users not knowing how to leverage the software's best benefits fully.

▷ **Problems with training.** Most software training consists of classroom training. This takes employees away from their desks and results in lost productivity rates. Additionally, there is a lack of training content across multiple channels and learning formats.

▷ **The onboarding process is poor.** When training isn't consistent and contextual, it's difficult to ensure that everyone is ready to use the software and understands the onboarding process.

▷ **Employees forget training.** Users forget close to 90% of traditional training information, setting users up for failure. By the time users get their logins and access the application they have forgotten what they heard and learnt few weeks or months ago in classroom training.

▷ **Checklist approach.** Most trainers use a "Yes/No" checklist approach to software training, instead of implementing a system to measure learning and retention.

3. Post-Go-Live Stage

The post-go-live state is the time after the software has been implemented and is officially part of the new workforce processes. The focus of this stage is primarily on offering support to users to make sure they use the software and use it properly.

As with the other stages of software implementation, enterprises without the right tools run into problems including:

▷ **No reinforcement learning.** Employees are expected to understand how to use the software after initial training sessions. Trainers rarely schedule reinforcement learning.

▷ **Training is not streamlined.** Employees are expected to use various software applications, but training isn't streamlined across different software applications. This is because trainers are often specialists in a single application. This makes it difficult to leverage the software applications fully.

▷ **No means of measurement.** Training team that use a traditional classroom approach to training have no quantifiable ways to measure software adoption, engagement user proficiency and the business impact of training. This makes it impossible to identify problems and conduct further training.

▷ **Users fall back to old patterns.** When training is insufficient, and applications are hard to use, users often neglect to use the expensive software and fall back into their old ways of working.

Successful digital implementation is contingent on superior training and support. In fact, research indicates that companies should invest at least a third of the overall budget into training if they want to expect results.

As it stands now, only a small percentage of the overall license and implementation cost is spent on training and implementation, and it shows. It shows in the lack of organization of the current software training approaches, the lack of ongoing support, and the stats that reflect surprisingly low software adoption rates.

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Training and Support Methods Matter

Allocating enough budget to employee software training is only half the battle. The type of training methods and ongoing support play a vital role in whether or not an enterprise's workforce will successfully take to new software.

According to a **recent study** by The Training Associates, 32% of learners rated their company training methods as either "sometimes effective" or "not effective at all," and corporate training teams are met with several roadblocks. Current training and support challenges include all of the following:

▷ **Inconsistency.** Training is taught in different methods and formats for the various applications employees are required to use. This inconsistency makes it difficult to ensure that employees are trained using a consistent, familiar format, depth and style.

▷ **Learning styles.** It's difficult to address different learning styles in a group training setting, especially when there is no hands-on training.

▷ **Software varies.** Applications including CRM, HCM, ERP, CLM, Supply Chain, Procurement, Finance apps, Customer Community apps, etc. are widely different, which requires individual training attention.

▷ **Ineffective.** Training is front-loaded, time-consuming, and there is no reinforcement in the flow of work.

▷ **Poor training resources.** Training content is typically not in the format and channels where users prefer to learn.

▷ **Lack of follow-up training.** Traditional training requires too much effort to maintain and update training for process changes, new features, and new users.

▷ **Little focus on change management.** Not enough time is spent on getting user-buy in and explaining why a software program is integral to business.

▷ **Support tickets are created after the fact.** If training is not comprehensive, employees create support tickets for answers to basic questions. Support tickets take an average of 2 days to resolve.

Humans learn 80% of what they experience vs. 10-20% of what they read or hear.

This is why traditional training with back up support is common, but this approach doesn't translate when it comes to software implementation.

The main reason enterprises experience low software adoption rates is because traditional training and support isn't up to par when it comes to what's required for successful software implementation. Approaching software adoption with old-school training methods will keep leading to future failures and outrageous costs.

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Chapter 2

The Answer To Your Tech Troubles - Digital Adoption Solutions

Gaining the full value of software investments is highly dependent on employees both adopting the software and rapidly achieving competence. The solution to failed adoption includes ensuring deployment success, investing in long-term support, and achieving a long-term ROI.

To accomplish this, enterprises need to look at software solutions that address all the top challenges with adoption. In other words, to successfully adopt new software and accomplish a positive ROI, a solution must solve all the complexities that come with new software as well as ensure ongoing training and support and positive ROI.

With an abundance of new technologies entering the marketplace, how do enterprises know which new software solution is commercially viable, and worth the substantial investment, and what is just hype?

According to Gartner's Hype Cycle—a methodology to help you separate hype from real drivers of a technology's commercial promise—digital adoption solutions (DAS) are a winning solution and entrant to the CRM Sales Force Automation Technologies & Digital Workplace Hype Cycle of 2019. This means digital adoption solutions are a legitimate answer to your digital transformation failures and do just what they purport to do including:

- Improve training methods, ongoing support, and the adoption of the multitude of tools across an enterprise
- Help employees effectively use an increasingly complex and integrated portfolio of SaaS applications
- Enable users to onboard quickly, resulting in improved productivity
- Create data-driven insights based on software usage
- Help organizations get the full value of their software programs to become more efficient and get value from their digital investments

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What Do You Really Mean By Digital Adoption Solution (DAS)?

Digital Adoption Solutions are a new category of software for enterprises, officially recognized by the recent **Gartner Report**, Increase Sales Productivity With Digital Adoption Solutions.

As mentioned above, enterprises use hundreds of applications with thousands of features. These apps are difficult to use, overwhelm users, and remain under-utilized. In fact, enterprise apps are used by only 15-54% of total users, leading to a glaring adoption gap. Not to mention, this adoption gap widens over time, eventually making the expensive software obsolete.

Digital adoption solutions work by walking a user through necessary business processes across multiple technologies, providing an interactive and contextual overlay on top of their software applications. This real-time training leads end-users through tasks and workflows at the exact time of their need. With ongoing support, digital adoption solutions eliminate the need for users to learn and call to memory individual functions for each program on their own.

In short, digital adoption solutions help plug the "consumption" gap by rapidly enhancing users' understanding and competence of enterprise software, and can deliver an immediate impact on new software implementations by successfully driving end-user adoption. Here is a deeper look.

How DAS Addresses The Problem?

Gartner's inquiry volume on digital adoption solutions has increased by 66% this past year. The reason is that digital adoption solutions provide a layer of adoption features across all enterprise applications to give users a seamless enterprise-wide experience.

By providing real-time, interactive training that lets users learn and get guidance on how to complete activities as they are working, adoption increases instantaneously. Here are some ways DAS addresses current problems with software adoption.

1. DAS is contextual

Employees in every department must use multiple and varying software programs to complete business functions. Digital adoption solutions provide contextual and automated training by offering personalized walkthroughs of various business functions when and where employees need it. Digital Adoption solutions provide guidance based on the user (e.g. individual), user attributes (e.g. new employee, tenuted eller, under Sales quota attainment), in-app location, organization role and any other custom application attribute.

▷ **Use case:** Enterprises are required to skill-up their sales teams and train them on CRM software. DAS provides training targeted for newbie sellers that is different from training provided to tenured sellers.

2. DAS is interactive

Various applications are challenging to learn how to use, especially when employees are engaging in inferior traditional methods, including reading a manual or sitting through a training presentation. Digital adoption solutions address this problem by providing interactive guidance within the application. In other words, employees can learn at the point of need while they are doing their daily tasks and actually complete those tasks and see them being finished while applying the guidance in the application.

▷ **Use case:** Sales teams use a CRM tool, CPQ tool, lead management system, sales forecasting software, sales training tools, and more. Each point solution requires individual training, increasing the complexity of the user experience. DAS provides an interactive overlay for all applications, guiding users across these different applications seamlessly by navigating within and across applications. With DAS, employees can see that their tasks are getting completed.

3. DAS works in real-time

Imagine the difficulty employees have calling training to remembrance when they are required to use multiple software tools. Digital adoption solutions provide real-time

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training overlays to guide users through tasks when they need help. This avoids putting cognitive load on the user to remember how to accomplish complex tasks.

▷ **Use case:** A user forgets an important in-app function that is necessary to complete a workflow. Instead of creating a support ticket, the user can consult the "guide-me" or self-help manual for an explanation of how to complete the task.

4. DAS is progressive

Your employees have different skill sets, various levels of technological prowess, and different learning styles. DAS provides users of varying skills and needs with guidance, instruction, in-place answers and real-time validation.

▷ **Use case:** Your enterprise can create training overlays and guides from the simple to complex for your software programs. This ensures that everyone—no matter how tech-savvy they are—gets a walkthrough of how to complete various tasks when they need it.

5. DAS is autonomous

Repeat processes can become tedious, even when you're using smart software to improve efficiency. Digital adoption solutions auto-execute repetitive tasks on behalf of the user leading to higher productivity.

▷ **Use case:** A digital adoption solution automatically complete navigation steps and will only prompt the user for data entry step. DAS also provide smart bots that can execute data entry and data retrieval for users even when they are offline- logged out of applications like Salesforce and Workday.

How Does DAS Help with Digital Adoption in the Various Software Launch and Ongoing Usage Phases?

An integral benefit of digital adoption solutions is that they support adoption and ongoing training from inception through the change and release management processes.

Here is how digital adoption solutions support adoption and training immediately and continuously through the various stages of software implementation and usage.

1. Pre-Go-Live with DAS

A digital adoption solution almost reduces the time and effort involved in the labor-intensive pre-go-live process by upto 63%. Instead of relying on old-school traditional training methods that don't work for software, a digital adoption solution enables learning in the flow of work as users are working within the app.

Here are just a few ways a digital adoption solution helps solve current pitfalls of the traditional approach to pre-go-live:

▷ **Shortens the learning curve.** Digital adoption solutions provide omnichannel guidance and microlearning curriculum. This means users learn in the way they prefer most and when they need help. Additionally, digital adoption solutions provide reinforcement training, as employees can access training resources on-demand.

▷ **Support offered in various learning styles.** Employees can access information through auto-generated articles, videos, PDFs, slideshows, URLs, and more. They aren't subject to a classroom setting or one learning style.

▷ **Training content is available in one, central location.** Digital adoption solutions give L&D managers and content creators the ability to author multiformat content in the app itself.

▷ **Real-time training.** Trainers can use LMS integration to manage formal & on-the-job training in one place.

▷ **Retention increases.** Trainers can create sequential microlearning curriculums to provide training that sticks.

▷ **Speed up the process.** Digital adoption solutions reduce the time needed for initial classroom training and ongoing refresher online training.

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2. Go-Live with DAS

With software that helps skill-up users, proper implementation is guaranteed. This means the focus can be on launching at the proper time, instead of making sure employees are fully trained.

Digital adoption solutions help improve the go-live stage in the following ways:

▷ **Ensure that employees use the software.** Digital adoption solutions offer users ongoing and real-time support, including overlays and walkthroughs. This transform users into Super-users with deep engagement.

▷ **Easy onboarding and ongoing support.** Successful software implementation requires more than one training. Digital adoption solutions provide effective application onboarding for new users and support existing users throughout their journey.

▷ **Step-by-step guidance.** Digital adoption solutions walk users through the software process with live step-by-step guidance with flows. This helps users get started in a way that makes sense and helps them effectively use the software.

▷ **Personalized.** Digital adoption solutions use flows, pop-ups, and guided tours to delight users with a personalized onboarding experience based on their profile, attributes and learning needs.

▷ **Automated.** Trainers can use and easily maintain automatically created segments for effective user targeting, eliminating huge manual effort.

▷ **Training reinforced.** Enterprises achieve higher data quality with real-time data validation on form fields.

3. Post-Go-Live with DAS

Since application software is innovating so quickly, it follows that training methods would also need to innovate. One of the most stunning impacts a digital adoption solution will have on your organization is its ability to offer ongoing support and

measurable data for improved performance.

Digital adoption solutions help significantly in the post-go-live stage with regard to all of the following: self-serve support, automation, analytics, and change and release management. Here is a closer look at each.

Self-Serve Support: Users in today's on-demand age find it frustrating to create and wait for a support ticket to be resolved. Digital adoption solutions help your users find the answers by themselves while you reduce your support costs. These are just some of the benefits you'll see with self-serve support:

▷ **Ongoing assistance.** You never have to wait for a trainer, IT manager, or support member to help you. A digital adoption solution reduces friction by acting as a 24x7 personalized digital assistance system.

▷ **Minimize support costs.** With real-time, in-app help, you'll see a reduction in support costs of up to 60%.

▷ **Personalized help.** Digital adoption solutions provide less intrusive and personalized help, and thereby more relevant answers, for whenever a user needs an answer.

▷ **Solve queries in real-time.** Digital adoption solutions surface existing knowledge base docs and repositories to bring in relevant external content to solve queries in real-time.

▷ **Get contextual answers.** Digital adoption solutions deliver contextual answers across all enterprise channels: LMS, knowledge bases, conversational chatbots, support tools, etc.

▷ **Support tools.** Reuse in-app content within support tools to guide users to self-addressed queries.

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Automation: Digital adoption solutions use artificial intelligence and machine learning to automate workflows, data retrieval and data entry. Here are some ways digital adoption solutions help you decrease manual effort using automation:

- ▷ **Automate non-value tasks.** Enable your users to spend their productive time on activities that add value to your business by automating non-value adding tasks.

- ▷ **Automate repetitive tasks.** Digital adoption solutions help you auto-execute repetitive tasks and save precious user time.

- ▷ **Select automation levels.** You can automate the walkthroughs to a point of decision or manual user action.

- ▷ **Search for "What is" questions.** Digital adoption solutions allow users to find answers in-app to answer "What is" questions.

- ▷ **Chatbot support.** Use chatbots integration to surface answers to user queries and create entity records (e.g contacts, accounts in CRM), without needing to log in to the app.

Analytics: It's difficult to ensure software adoption without a way to measure usage. Digital adoption solutions provide built-in analytics so you can continually measure and improve in the post-go-live stage. Here's how:

- ▷ **Find the disconnect.** Digital adoption solutions help you understand what questions users are searching for but not finding the answers. This helps you improve your digital adoption solution modules. You can also earn where users are struggling or abandoning the process and optimize content for better performance. Additionally, you can identify steps where users are dropping off without completing the process.

- ▷ **Measure impact.** You can get insights on how well the guidance is affecting user behavior.

- ▷ **Adoption metrics.** You can track and measure the number of users in training and see user engagement metrics.

- ▷ **Measure effectiveness.** Analytics help you measure the effectiveness of existing content, onboarding tasks, training plans, and more.

- ▷ **Identify new content opportunities.** Identify opportunity for creating new content based on unsuccessful search terms in self-help.

- ▷ **Elicit survey feedback.** Digital adoption solutions also allow you to gather real-time feedback with in-app surveys. This helps you improve content based on employee feedback.

- ▷ **Integrations.** Digital adoption solutions allow you to integrate with third-party analytics tools to combine insights from other sources.

Change and Release Management: The last notable way digital adoption solutions help you in the post-go-live stage is by improving change and release management efforts. Here are the benefits:

- ▷ **New feature updates.** You don't have to run an in-class training when you launch new features. You can do it all in the app.

- ▷ **Guide users to high-value features.** L&D can use the digital adoption solution to guide users to high-value features and changes.

- ▷ **Ensure compliance.** HR and L&D can ensure compliance through reinforcing changes.

- ▷ **Analytics.** A digital adoption solution helps you measure the impact of change using user and trainer analytics.

With how much cost and risk that is involved with implementing new software, it makes sense to invest in a training solution that ensures success.

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How Does DAS Work?

This article has addressed how DAS addresses complex problems with digital adoption, but how does the technology actually work? Here is a diagram that shows the mechanics of how the solution works.

Tech Architecture Diagram:

How DAS Platforms Sit On Top Of Enterprise Applications

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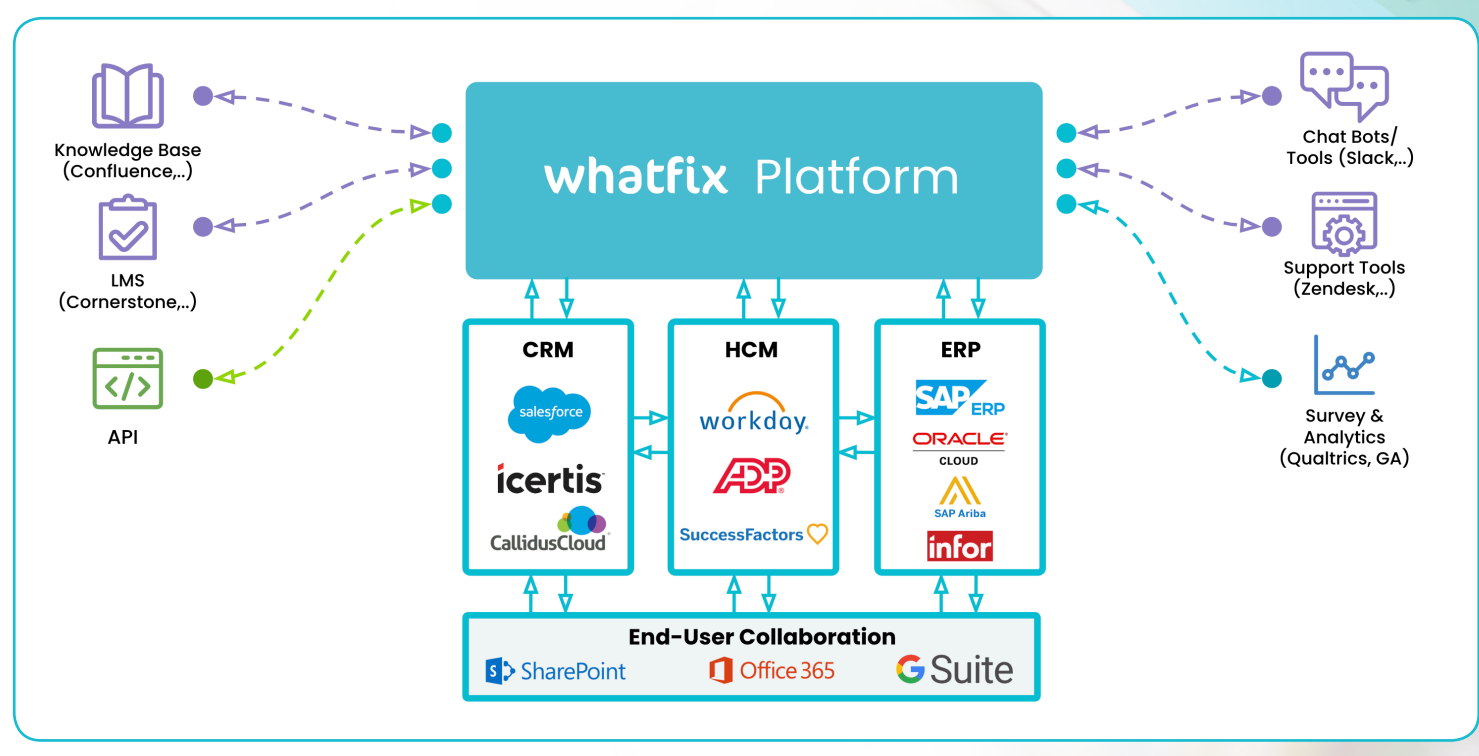
Value Derived from DAS:

With over $390 billion spent on enterprise software, what is the actual value of investing in yet another software program, that claims to increase the ROI on the underlying application software?

The answer is simple. Digital adoption solutions, according to recent research, are the way for enterprises to successfully adopt expensive (yet vital) enterprise software, reduce time to launch, increase employee productivity, and see a positive software ROI.

The following infographic provides detailed insight into the true value of investing in a digital adoption solution.

Economic Impact (ROI)

Total Enterprise Savings	Faster Time to Productivity	Reduced Time to Launch Salesforce
$10 Million	**2.5 - 3X**	**33-50%**
Savings for an enterprise with 8000 Sales Reps	Faster time to productivity for a Seller and employee	Reduction in the time to launch Salesforce/CRM to a new Business Unit

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Chapter 3

Accelerating Product Adoption The Whatfix Way

When it comes to investing in a digital adoption solution, you want to get it right the first time. Whatfix is a leading digital adoption platform that helps companies provide intuitive onboarding and effective technology training and support.

This chapter provides information on the unique features and benefits of Whatfix, vital stats showing why Whatfix works, and a compilation of testimonials from Whatfix clients that have experienced success.

Unique Whatfix Features & Benefits

Whatfix customers typically report a 45% reduction in level 1 support queries, 35% savings in training content creation costs, and a 25% reduction in employee knowledge discovery time.

In addition to sales force operations, Whatfix customers have accelerated adoption across their human capital management, financials, procurement, contract management, B2C marketplace seller management, security, and collaboration applications.

↓ **45-60%**
Reduction on Support Queries

↓ **60-85%**
Reduction in Training Content Creation Costs

↑ **25-37%**
Increase in Sales Rep And Employee Productivity

Unique Features:

The following unique Whatfix features are what make Whatfix clients experience ease of adoption and high success rates:

▷ **Adoption Everywhere.** Show the right content at the right time for every user using Whatfix's content exchange capabilities. Whatfix contextualizes all your enterprise knowledge (knowledge bases, web-based content or inside-documents) and surfaces them in-app. Users get updated training and support in multiple formats and over various mediums, no matter where they are.


▷ **Easy to Deploy and Maintain.** Training and line-of-business managers can simply walk-up to the Editor and author content without writing code. Our AI algorithms deeply detect each element on any webpage and automatically and intelligently segment content based on the user, role and in-app location requiring minimal

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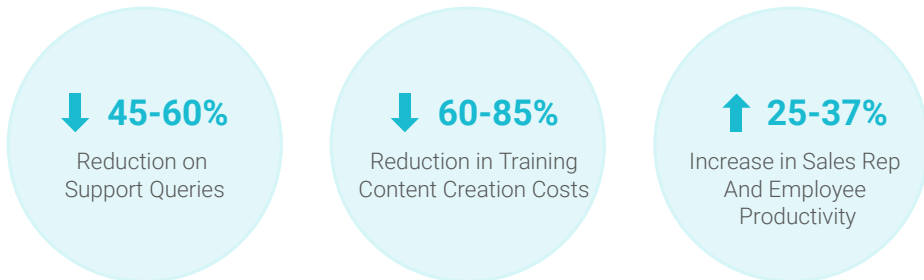
maintenance effort. We invest in your success by providing no-charge onboarding service for the first roll-out.

transformation journey and handhold our customers and make sure they achieve the results they aim for.

6 Unique Features enable Accuracy, Contextual Targeting & Speed

NPS TREND
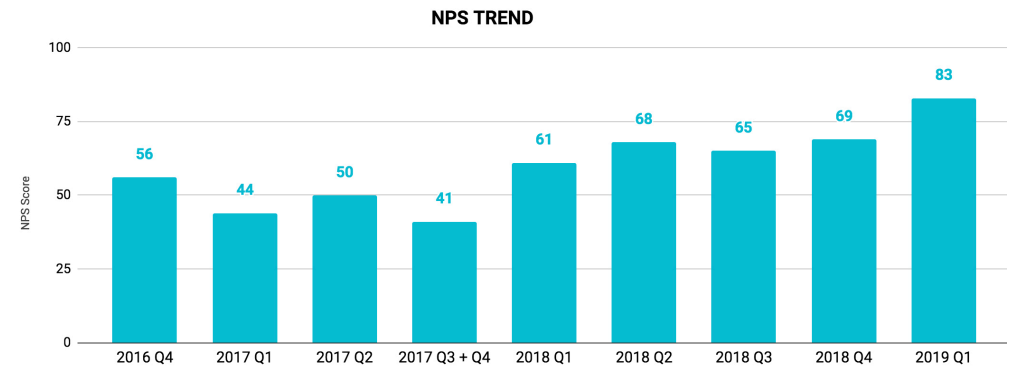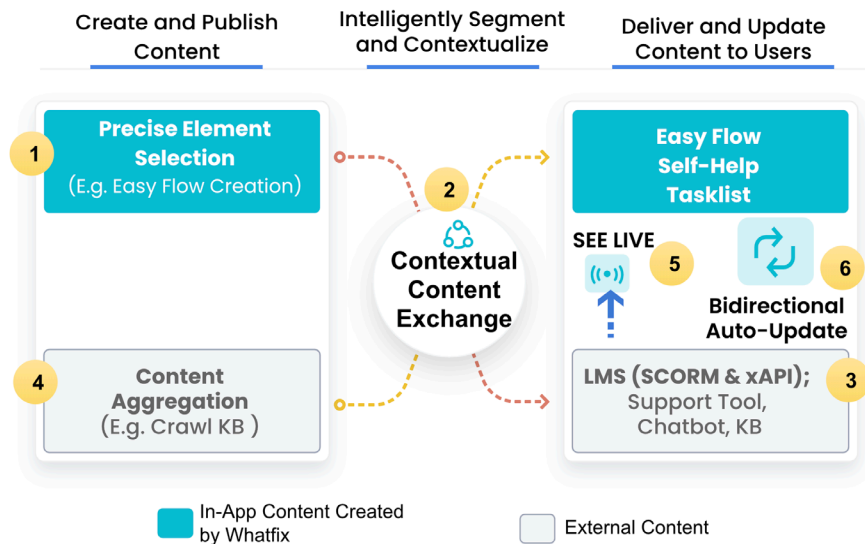
▷ **Open Ecosystem.** Enterprises deserve to leverage existing systems and have the flexibility to use best of breed systems- without their DAP provider forcing their own systems (e.g. LMS, Session recording). Whatfix fosters an open ecosystem by integrating with the highest number (50+) enterprise technologies like analytics tools, chat tools, chatbots, knowledge bases, LMS, survey and session recording tools.

▷ **Highest Customer Satisfaction.** Whatfix has been rated the highest in customer satisfaction in the G2Crowd DAP grid. Whatfix has consistently received an NPS score of >65 from customers across the globe. We become a partner in your digital

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Benefits from Whatfix DAS:

1. Enable Learning in the Flow of Work

Whatfix shortens your employees' learning curve on new applications through reinforcement training. With Whatfix, users learn in the way they prefer most. Achieve a 60-85% reduction in content creation and the costs of updating content. Reduce time spent in classroom training and ongoing online training by 40-60%.

2. Transform Users into Super Users with Deep Engagement

Use Whatfix to provide effective application onboarding for new users and support existing users throughout their journey. Welcome new users with personalized messages and product tours. Provide live step-by-step guidance with flows to help users execute tasks.

3. Help Users Make a Smooth Transition to the "New Way"

Make it easy for users to adapt to change. Whatfix can help you keep employees aware of new changes and train them on application and process changes. Whatfix facilitates this process by:

- Significantly reducing the effort of keeping content updated by using auto-generated multi formats
- Guiding users to high-value features and changes to keep users productive and reduce disruption
- Highlighting changes using beacons and provide guidance to drive adoption

4. Reduce Manual Effort Using Automation of Flows and AI/ML

Empower your users to do more with less. Help employees stay focused on the productive activities that lead to business results. Auto-execute repetitive tasks and save precious user time. Keep the power in the hands of users: automate flows to the point of manual decision/user action.

5. Continually Measure and Improve your Content

Understand which content users are benefiting most and continually optimize content for better performance. View metrics that show where users are struggling or abandoning the process. Track and measure the number of users in training.

6. Reduce Friction with 24x7 Personalized Digital Assistance

Users in today's on-demand age find it frustrating to create and wait for a support ticket to be resolved. Whatfix helps your users find the answers by themselves, while you reduce your support costs by up to 60% by providing real-time, in-app help.

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Let's Talk Numbers: ROI You Can Derive with Whatfix

What is the true value of implementing the Whatfix digital adoption solution in terms of ROI and cost savings and sales gains? The value you achieve with Whatfix depends on how large your organization is, how many employees you have, how many software apps you use, etc. However, here is an estimation of how much one large enterprise with 5,000 sales representatives would save in various areas of business.

Measuring Customer Value Delivered: An Estimation For One Enterprise with 5K Sales Representatives

▷ **Content Creation.** Whatfix decreased the amount of time it takes your content team to create training presentations and walkthroughs. This results in an estimated .$02M in savings a year.

▷ **Initial Classroom Training Costs.** Whatfix helps corporate trainers save on classroom training costs and materials. This results in an estimated $.68M in savings a year.

▷ **Ongoing Application Training Costs.** Whatfix provides ongoing contextual support, eliminating the need for regular reinforcement training. This results in an estimated $.72M in savings a year.

▷ **Sales Representative Productivity - Task Execution Costs & Info Search Costs.** One of the most significant benefits of a DAS like Whatfix is how much time you get back in terms of sales team productivity. For a company with 5,000 sales reps, it's estimated you would save $2.80M a year on task execution costs and $1.35M on info search costs.

▷ **Sales Volume.** When you increase sales representative productivity rates, your sales volume increases. This results in an estimated $.76M in gains each year.

▷ **Support Costs.** In-app, real-time, contextual training leads to a significant decrease in support tickets. This results in an estimated $.19M in support costs a year.

▷ **Sales Data Quality (Cost of Errors).** Whatfix also improves data entry methods, reducing the cost of any potential errors. This results in an estimated $.06M in savings a year.

▷ **CSAT.** Customer satisfaction rates are also projected to increase to 80%-90% in terms of "5 - completely satisfied" ratings. The happier your customers are, the better your retention rates are.

Again, the value you achieve depends on the size of your organization, which features of the DAS tool you use, and how many apps you use. However, if you adjust these estimation according to the size of your organization, it gives you an idea of how much the digital adoption solution, Whatfix, contributes to your company in terms of ROI.

Measuring Customer Value Delivered

	$ Savings & Gains* $6.58 M		⏱ Savings*
Content Creation & Updation Costs	$0.02 M	67% ▼	60-85% ▼
Initial Classroom Training Costs	$0.68 M	40% ▼	40-60% ▼
Ongoing Application Training Costs	$0.72 M	50% ▼	50-60% ▼
Sales Rep Productivity - Task Execution Costs	$2.80 M	0.6% ▼	0.5-2% ▼
Sales Rep Productivity - Info. Search Costs	$1.35 M	25% ▼	25-35% ▼
Sales Volume (Revenue)	$0.76 M	0.05% ▲	N.A.
Support Costs	$0.19 M	50% ▼	45-60% ▼
Sales Data Quality (Cost of Errors)	$0.06 M	20% ▼	20-30% ▼
CSAT	80-90% rate CSAT 5/5	N.A.	N.A.

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What Our Clients Think About Whatfix

You don't just have to take our word for it when it comes to determining the value of investing in Whatfix. Many of our clients have experienced significant results.

It's also worth it to note that 92% of B2B buyers are more likely to purchase after reading a trusted review, and we encourage you to do the same. To help you out, here are the top success stories and reviews as reported by our customers.

trotec®

Trotec Laser Reduced Their Salesforce Training Efforts By 60% WithWhatfix

Whatfix helped Trotec build real-time interactive walkthroughs and improve Salesforce Lightning adoption and acted as a supporting tool to in-house Moodle training modules. Since Trotec's implementation and deployment of Whatfix in July 2017, Trotec has been successfully able to:

- Reduce their training and content creation effort by about 60%, enabling them to reuse the created walkthroughs.
- Cut down creation time of training materials by up to 50%.
- Measure the completion of Moodle courses via Whatfix SCORM package.
- Enable users to get live contextual help in Salesforce directly from within Moodle.

"It is very easy to create walkthroughs that guide users on our Salesforce CRM. Great admin backend. Whatfix's analytics is a powerful tool to see the progress of the users and train them on point." -Juergen Bonifarth, CRM Specialist, Trotec Laser

bmc

Whatfix Solved BMC's 10,000+ Queries With 34 Interactive Guides

Whatfix helped BMC Remedyforce develop real-time walkthroughs depending on the requirements of free-trial users. Whatfix helped BMC add a total of 34 in-app interactive guides to the Summer 16 release of Remedyforce.

With over a year of integration with Whatfix and the results have been astonishing for BMC including:

- 50% of sellers self-trained via Whatfix.
- 12% reduction in support costs.
- 6,000,000+ steps executed in one year.
- Whatfix supports all the languages supported by Remedyforce.
- The efficiency and usefulness of **Whatfix** on Remedyforce have paved the way for multiple licenses for other BMC products.

"Customers always told us that this type of in-app help is their most preferred way of receiving help. Whatfix's integration will definitely accelerate the see-try-buy cycle and our team can directly impact the top line." -Paresh Naik, Senior Manager, BMC

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The Experian Success Story

Experian is one of the largest consumer and business credit reporting agencies in the world, helping people take control of their finances and make smarter financial decisions all while helping lenders lend more responsibly. Experian is a constituent of the United Kingdom's FTSE 100 index, and the latest reported revenue earnings total nearly US$4.7 billion.

As one of the largest credit reporting agencies, Experian supports clients in more than 80 countries, and employee nearly 17,000 people in 37 countries, making global training efforts a significant and challenging undertaking.

Experian's Challenges

Experian recently made a substantial investment in Salesforce to their salespeople manage business and client relationships. Despite Experian investing in a strong Salesforce training program, employees initially struggled to successfully learn how to use Salesforce and fully leverage all its features.

This was especially true considering the need for Experian to heavily customize Salesforce to carry out detailed business processes.

Experian's training team decided that to accomplish adoption of Salesforce, they needed to look for an interactive, on-demand training tool that helps drive adoption of Salesforce worldwide, empower sales teams to use the highly customized platform, drive quick Salesforce proficiency, and provide ongoing training support.

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The Solution : Whatfix

Experian did their research and selected Whatfix as their training solution. The 'Whatfix powered' onscreen guidance technology has been game-changing in how training is delivered at Experian for both onboarding and reinforcement.

Here are some top ways Experian uses Whatfix to solve training challenges:

- Interactive On-Screen Guidance: Whatfix transformed the way Experian trains employees. Instead of new employees needing to onboard by going through 19 modules, they only have to go through 6 modules. Additionally, Whatfix provides hands-on, interactive training in the form of 40+ walkthroughs. An always-available self-help menu (internally called 'guide-me') provides users contextual information whenever users are unsure how to perform a process or task, saving precious time in asking SalesOps team for help. Whatfix helps users get on-demand training while they are using Salesforce.

- Multi Formats to Reduce Video Creation Effort: Launching Salesforce in a new business unit could require a few months of content creation effort. However, Whatfix's auto-generated multi formats (videos, PDFs, slideshows etc.) reduced that time to a month. The content maintenance effort for the frequently changing Salesforce, especially on videos that could run into days is also done now in minutes! Experian also plans to leverage Whatfix's SCORM integration to use this content as learning courses in their LMS Cornerstone.

- Salesforce Specialization: Whatfix has specialized features including intelligent segmentation and automatic element detection that automate the intricate pieces in content creation and administration. This makes it easy for employees to learn complex and custom Salesforce processes.

- Dynamic Reinforcement Training: Whatfix has enabled Experian to deliver definitive, targeted reinforcement training content to its diverse user community across regions and business units (BUs). It's become easier to demonstrate the value of Salesforce when used correctly by addressing frustration with often opaque processes. Content creation is more flexible than ever before with key regional stakeholders now playing a more active part in the development process. Regional and BU specific Salesforce processes can now be followed with onscreen guidance, even in the local language where appropriate. Sales-

reps now feel more empowered with the significantly improved Salesforce user experience. Whatfix has played a part in improving the acceptance of modern technology by sales reps at Experian.

With the help of Whatfix, Experian was able to increase engagement of Salesforce, provide reinforcement training for geographically spread teams, increase onboarding times, and improve internal data quality.

ROI Achieved

Experian reported the following benefits to their business since starting to use Whatfix:

- The time to launch Salesforce in a new Business Unit went from 2-3 months to 1 month.
- Time to adoption went from 6-8 months to 2-3 months.
- Onboarding modules were reduced from 19 to 6.
- Data quality increased by 20%.
- Training time went down by 50%.
- Training content creation time was reduced by 60%.
- Content maintenance went from days to minutes.
- Experian gained 6.2 hours/user in returned productive time.

Whatfix provided Experian personalized, real-time training with interactive walkthroughs, localization of content to suit the language and needs of local BUs, self-service help, multi format content, and more.

"Top vendor, great solution! With a heavily customized Salesforce instance and multi-cultural processes to cater to, the flexibility of Whatfix empowers us to get the right training to the right people, at the right time!"

-Lee Glenn, - Sr. Specialist, Global CRM Training.

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Conclusion

If your digital adoption rates are low, the time is now to seek out a solution. With the help of a digital adoption solution, like Whatfix, you can immediately start:

- Driving user adoption across your enterprise SaaS applications.
- Creating and delivering digital training content that is easy to scale.
- Providing real-time, in-app, task-based training for your employees.
- Delivering contextual self-service help embedded within your applications.

The benefits of investing in a digital adoption solution are not insignificant. Based on interview feedback from Whatfix customers, companies experienced the following quantitative and qualitative benefits, (numbers adjusted to a one year period):

- Reduction in application support tickets by nearly 45% resulting in average savings of up to $34K in the first year.
- Employee training content production and delivery cost savings of up to 35% in the first year, translating to $65K.
- Provision of always available contextual support reduce employee efforts and time spent in knowledge discovery directly resulting in productivity benefits of up to $278K in the first year.
- For a software application with a Total Cost of Ownership (TCO) of $1.8M and expected returns of 200% over a one year period, Whatfix can help increase cash flow by as much as $1.08M each year.
- Delivery of up to a 30% higher adoption of software systems when compared to legacy training processes.
- Shorter and effective employee learning curve due to task-based learning replacing part of rigid formalized learning processes.
- Higher engagement within the software application leading to improved usage.
- Better workplace experience derived from a modern, digital training solution that is much more aligned with employee expectations than other learning processes.
- Higher employee satisfaction resulting in increased workplace productivity and performance.

Digital adoption solutions are entering the marketplace as a solution to your training woes. As your organization grows, remember there is now a new category of innovators in digital transformation appearing—Digital Adoption Professionals (DAPs). Make an impact on your organization by becoming a smart advocate for digital adoption. Contact Whatfix today for more information about how to get started.

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