

WalkMe analyst day

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WalkMe, makers of the digital adoption platform designed to provide personalized guidance and automation across nearly any software system, hosted an analyst event in New York City to share their latest updates and highlight key customer use cases.

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In the business of change

WalkMe is a digital adoption platform, which often conjures up images of the help bubbles that pop up when you've downloaded a new app on your phone (access your records here, reach out for support here and the like). In fact, the platform was developed 12 years ago to help the CEO's mom learn how to use the internet. But WalkMe is about much more than learning the clicks inside new software. They're in the business of change.

As WalkMe CEO, Dan Adika, points out, despite the growing amount of technology available and being deployed by organizations, most digital transformation projects fail (70% of them, to be exact). Our own research supports this, with our [Global Talent Trends 2024](#) study revealing two out of three executives admit to rolling out new technology without transforming how work gets done.

With the rate of technology outpacing the rate of digital adoption, organizations are facing a change management problem that traditional training methods simply can't address. And in today's world, change doesn't have a finish line (it's constant), so organizations will need to gain greater visibility into their change management and digital adoption problems and build for constant change while keeping people (and their experience) top of mind.



**Change has no
finish line.**



— Dan Adika, CEO of WalkMe

AI that works for people.



Going beyond software adoption

Beyond helping people more easily adopt new technology, WalkMe helps to orchestrate process and policy adherence in the flow of work. For example, WalkMe can help prioritize incoming service tickets and offer up guidance to help the agent resolve them faster. Or, it can prompt an agent to see if an employee is eligible for a new laptop if theirs won't start.

WalkMe's platform focuses on three main areas:



Data:

Analyzing application usage, workflows, forms and analytics, WalkMe shows you where there's friction inside your organization that you can reduce or remove.



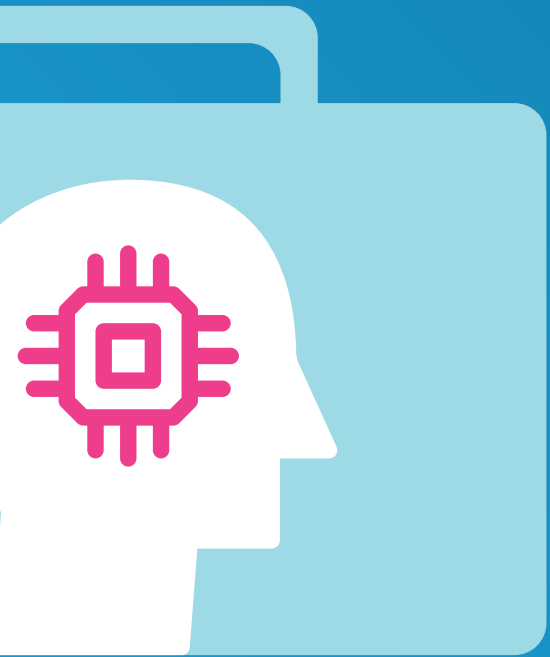
Action:

Guidance creation, workflow automation and workflow accelerators offer prepackaged and easily customizable automations to help boost productivity, reduce errors and increase compliance.



Experience:

In-app guidance, the conversational interface and workstation hub for employees deliver personalized and automated experiences across nearly all applications and workflows.



WalkMe's federal partner, Red River, shared how they're using WalkMe to help drive better change management and digital adoption inside the U.S. Department of Defense, which is known to have intense oversight that prohibits them from moving as rapidly as they might like sometimes. WalkMe helps them catch up by helping them rollout change with less friction so they can be more agile.

I got the chance to take part in their WalkMe challenge, where I raced to complete my Salesforce order entry faster than my competition. I had the advantage of using WalkMe in my challenge, so naturally I won. Not only did the software help me focus on the fields that were most important in Salesforce, but it also helped me stay aligned with company policies and offerings by asking intentional questions throughout the process. As a former Salesforce admin of 15+ years, I can attest to the fact that this is a gamechanger. Sales representatives don't want to worry about if they have fields right in their CRM — they just want to get in front of the next customer (and collect their commissions). Applying this to HR, imagine how easy it would be for employees to sign up for benefits that make the most sense for them, or for recruiters to spend less time in their ATS and more time with candidates, or for hiring managers to stay on top of what's important for their next 1-on-1 with their employee.

The ideal state of AI? Using AI without knowing you're using AI.



Context matters

WalkMe made a bold prediction at this event: **Most generative AI initiatives won't deliver on their promise.** That's because, despite so many vendors leveraging generative AI in their products and creating copilots to make the experience conversational, you still have to know how to engage with the AI to get the best results. They shared an example of using an AI image generator to show the WalkMe logo in nature. The output was a half-readable logo on top of a volcano — not really what they had in mind. However, once the prompt was adjusted to include things like logo resolution, font type, brand guidelines and inputs on the type of nature desired, they ended up with the serene imagery they were after.

Whether the AI is looking up and analyzing data, completing tasks, generating text, or creating images and videos, it needs the right context to produce the right outputs. Training employees on how to be prompt experts across all these different systems, which were all trained by different data that requires different context to deliver accurate and useful results, is nearly impossible. WalkMe aims to solve this challenge through their new generative AI offering, WalkMeX, which is designed to make AI accessible to everyone. And the key is context.

By understanding who you are and what you're trying to do, WalkMe can provide the right contextual cues to other AI systems, creating custom, context-fueled prompts and analyzing the results to further refine them before delivering results or actions back to the person. And this isn't just another copilot — it's a proactive alert system with always-on AI assistance serving up guidance unprompted, alongside on-demand AI assistance which is available inside of the tools you and your team are already using today.

After all, there's no real benefit in going from logging into dozens of systems to interacting with dozens of copilots — that's just adding another layer of complexity and confusion. The ideal state of AI is using AI without knowing you're using AI.



Taking the scary out of AI use at work

WalkMe is also being leveraged to create guardrails for AI, making it safer and easier for organizations to get started with AI and grow their AI muscle across the organization over time. Because it can be used to help enforce policies and guide people in their use of technology, it can be used to limit the use of features in certain applications, or it can prompt the user to review and confirm they're within policy before proceeding (when there is use that might violate a policy, such as uploading a document that might have sensitive information in it).

This makes it possible for organizations leveraging WalkMe to empower their employees to experiment with AI while reducing the risk of accidental or intentional misuse. And with WalkMeX, they can easily leverage new AI without facing a steep learning curve.

WalkMe customer KPMG shared how they leverage WalkMe to help them better utilize AI, first to introduce AI into the flow of work, then to help employees understand how to safely engage with AI, then by improving the employee experience and productivity through standardized frameworks that help everyone gain benefit from AI and innovation. They stressed the need for a phased approach with WalkMe. Using their “crawl, walk, run” approach, WalkMe suggests starting small with quick, easy automation and workflows to get people comfortable using new technologies or processes, then continuing to build more nuance and automation over time until that becomes normal for your team.



Deloitte, who leverages WalkMe both for their own employees, and to deliver digital adoption solutions to their clients, shared how their client, Whirlpool, was looking to drive increased self-service support on SuccessFactors to reduce the number of specialized help desk tickets they received. Deloitte deployed over 40 different advanced digital adoption solutions to support intermittent processes like mid-year talent assessments, which are updated and enhanced each year through WalkMe. And Cisco shared how they're optimizing critical workflows using WalkMe, supporting both enterprise-wide workflows, as well as department-specific ones, such as sales onboarding.

These customer stories highlighted the importance of trust, which is key in any AI discussion, especially when it's set to disrupt nearly every job there is. It's important for leaders inside the organization to talk about AI, technology and change in general, acknowledging its impact and the challenges it brings. Helping employees understand how AI will impact their job is key, but so is helping them understand that their value comes from more than the tasks they have done in the past. Their value comes from being able to adapt, to learn, to collaborate, to think strategically and to carry out tasks that are uniquely human. WalkMe frees them up to pursue more of those human-centered efforts.

Trust is key to change.



Our advice

To leaders:

If you're looking to AI to help you solve some of your current and long-term challenges, consider how WalkMe could be a great complement to your AI strategy by enabling you to put guardrails on your AI products to reduce risk, while encouraging experimentation to increase productivity and efficiency. It can also help you speed up the adoption curve when it comes to AI. Better yet, it can help you fully transform how you work and how you leverage technology so you can reduce friction for your team.

WalkMe is designed to grow with you and your complexity over time. It can do so much that it's easy to want to do everything all at once, but please don't. Instead, pick a use case that needs solving, focus on that, then grow and expand so it's easier for you and your organization to absorb the change.

To WalkMe:

WalkMe's move toward making AI more accessible and viable for everyday workers is a smart play that keeps them relevant to their customers. And building a copilot that connects all other copilots together undoubtedly solves an immediate challenge to the copilot overwhelm that is fast approaching the work tech market. However, it likely won't be long before other providers latch onto the idea of "one copilot to unite them all" which will reduce WalkMe's differentiation in the market and lead us to a battle similar to what we see in skills, with every vendor trying to be the ultimate source of truth. We would love to see WalkMe highlight more around their long-term vision and how they plan to stay relevant for the long haul.



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