



The Enterprise Class
Guidance and Engagement Platform

White Paper

The Road to Successful Software Adoption

By WalkMe





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Introduction:

The Power of Certainty –

The Importance of Simplicity in Effective Software Adoption & Implementation Strategy

Choosing and purchasing the right business software are important decisions within the life of any enterprise

- 50% of project had cost overruns
- 60% did not meet their schedule
- 60% did not receive half of their expected benefits

INTRODUCTION - THE CHALLENGE:

Choosing and purchasing the right business software are important decisions within the life of any enterprise company. Each platform, whether an ERP, CRM platform, HR software, or something else have to be carefully weighed and evaluated as to which might be the best fit for the company, in terms of functionality, accessibility, pricing and more.

Yet, once they decided on which software to choose, discussion and strategizing turns to how to effectively implement the software and to onboard new users. To be clear, we are talking about a difficult, complex and time-consuming process, one which is far from a guaranteed success. Even in the cloud era, when SaaS software has become a dominant force in enterprise software, implementation isn't a walk in the park. For example, here are some statistics related to ERP and SaaS-based ERP implementation success rates:

Success Rates: *ERP & SaaS-based ERP Implementation*

Panorama consulting ERP (26% cloud) success rate [survey](#) from September 2012 to January 2013:

- 50% of projects had cost overruns
- 60% did not meet their schedule
- 60% did not receive half of their expected benefits

[Diginomica](#) draws this conclusion from other observations:

In reality, the cloud hasn't changed the difficulty of bringing new practices into any organization and bringing team members up-to-speed with new ways of working.

They cite the main reason as lack of skills with the products and lack of professional services from these new companies due to the fact that these are young companies who have not had time to grow that part of their business.

PURPOSE OF THIS PAPER:

So with the challenges well-known, once you have selected a SaaS vendor and application, what is the best-practices approach to ensuring a successful implementation? How can you align the new platform and product with the rest of the firm's business and IT strategy?

Sort the workload based upon what is most important, taking into consideration benefit versus cost

This white paper will present a roadmap to effective software adoption and implementation. Along the way, I will present a series of steps that are necessary during the implementation process. I will also explain how WalkMe, an online guidance and engagement platform, will assist you in more easily and successfully onboarding users to the new software, and make sure they can focus on using the software productively, relieved on wondering HOW to operate each function. I hope you find it valuable and that it will help bring your team toward new heights.

We'll go into detail in a moment, but to begin, let's look at just a couple of starting points:

Select an Implementation Strategy

If a project does not follow a well-defined methodology, there is the tendency to get off track and spend time working on items that are not core functions. This can result in delays and going over budget. So there needs to be a selection of an implementation strategy, before you start. Its focus should be simplicity.

Keep it Simple; Focus on What is Important; Dump the Rest

The best approach is the simplest approach. One can look at the field of statistics and adopt the Pareto principle (also called the 80/20 rule) or look at rapid development methodologies like Agile or Scrum. These approaches say not to spend time on every desired feature. Peripheral or nice-to-have functions do

not yield measurable gains over sticking with what is most important.

Focus is important as when going through complex processes, introducing new software until now unfamiliar to your team members, enable them to keep an eye on the prize and learn the essential elements, while saving less common processes and less critical knowledge until later on.

Focus on Effective User Onboarding and Knowledge Management

It's important that training your team members on how to use the new software is, on the one hand, as fast as possible, but also that it leave a lasting impact. Part of the challenge of user adoption on a new software is, fear – that is the uncomfortability of having to learn something new and unfamiliar. From the other side, the way to get over that fear is through good communication and training users in how to use the new software in a way that doesn't overwhelm them with too much information right away, as well as delivers key knowledge when they need it the most. Knowledge equals confidence, and you are responsible for fostering that confidence. The idea of the Pareto principle is very much relevant to software onboarding and knowledge management in the long term – focus on what is most important. How to best ensure that happens we will discuss in more detail.

Anything pushed to the side could be tossed out completely

The Take Away:

The take away from these methodologies and the Pareto principle is sort the workload based upon what is most important, taking into consideration benefit versus cost. Keep a list of the most common and critical business processes (work tasks on the software) that users will have to perform. As one selects tasks and assigns resources given timelines, anything pushed to the side could be tossed out completely. This helps to keep the process of adopting and implementing the new software simpler, thus more likely to succeed.

Get Organized

Only someone at the executive level can affect change across the organization

Find Executive Level Sponsor

No project will enjoy success, unless it finds a sponsor. If this is an enterprise endeavor then it cannot by definition be run by a departmental manager; only someone at the executive level can affect change across the organization.

Organize Steering Committee

You need a steering committee to write a project charter, outline the scope of the project, document the business reason why it is necessary, and write clear goals for which the sponsor is responsible for signoff.

Select Project Manager & Leader

The next task is to assign a project manager and project lead. The project manager's task is to work with the project lead to lay out a schedule, define what resources are needed and when to bring them on board, and set milestones.

Pick the *Right* Person

The project leader has to have a strong personality to battle entrenched interests, smooth over people who are reluctant to change, and navigate company politics. He or she will prevent people from working on items that are out of scope. He or she can quickly determine which team members are the best engineers and leaders and give them responsibility to mentor or oversee the work of others.

Layout Schedule, Milestones, and Resources

If the SaaS cloud-service provider is already selected, you presumably have already decided whether to work with a systems integrator. These people are resources available to add to the work plan. The project leader is responsible for the day-to-day operation of the project.

The project leader has to have a strong personality to battle entrenched interests, smooth over people who are reluctant to change

Data Migration & Conversion

The SaaS service provider should provide a development, test, and production environment

Plan Data Migration

The project needs to plan what data needs to be migrated to the SaaS system and how. The architect can lead this effort with input from the developers. Most SaaS systems will include some kind of bulk loader or web services interface, so that the programmers can load data into the new system without having to write something overly complicated.

Based Upon Gap Analysis: Bolt-ons & New Environments

The SaaS service provider should provide a development test, and production environment where the team can work on extensions to the product and work with the SaaS vendor to install any bolt-on third-party solutions and do unit and functional testing. Gap analysis should have been completed in the vendor-evaluation stage to figure out what additional software is needed for the business. Many SaaS platforms, Salesforce.com, for example, have partnered with lots of companies that offer such bolt-ons.

It is best to use some kind of common interface software rather than write lots of custom programs.

System Integration

Connect to Upstream & Downstream Systems:

Stick with Packages Tools

There is the need to establish points where the system must connect to downstream and upstream systems. For example, the order entry system should connect to the shipping system which should connect to warehouse management. Each of these systems will have predefined interfaces or, in the absence of that, interfaces that require custom programs.

It is best to use some kind of common interface software rather than write lots of custom programs. Batch programs, in particular, tend to not alert anyone when they stop working or when the data transfer mechanism fails. For file transfer and messaging, the project should adopt something dependable, like OpenMQ.

Functional Testing & Unit Testing

TDD for Custom Code

There is a kind of development model called Test-Drive Development (TDD) that you can use for system integration. This puts functionality ahead of programming. This focuses the programmer's efforts on passing the test, which by definition keeps the development targeted on a specific business goal.

SaaS:

Traditional Testing Approach for SaaS Packaged Software

For SaaS (packaged software), the program is already written, so there is little or no development, only configuration. SMEs configure it to meet your business needs. For that, a mix of TDD and traditional testing approaches can be used.

Write & Execute:

Functional Testing & Unit Testing

Developers write code to do unit tests that checks specific parts of the program. The functional test persons write test cases that focus on requirements. They execute those tests plus do end-to-end testing that ensures that the system integrates with upstream and downstream systems.

Development model called Test-Drive Development (TDD) that you can use for system integration

Strategize Training

People are human, and they learn by repetition and through practical application of the knowledge transferred to them. It would be better to give, say, one day of training every two weeks so that the employees are exposed to the new system in digestible chunks.

Close monitoring of user success, particularly in the early stages – provides a good analysis

The Basic Principle:

Keep Training Short; Do Not Give it Too Early; Give a Test at the End

Continuous Learning:

Training does not just mean sending employees to a training class early in the project and then dropping that. Even if classroom training is less of your focus, implementing more e-learning in the initial training period, it's important to remember that training should be ongoing and frequent. 'Continuous Learning' as it is sometimes referred to in the world of employee training. In other words you need to adopt a strategy towards training.

Proper Timing:

Too much information, given all at once and too early, will just make people forget what they have learned, when the software goes live. People are human, and they learn by repetition and through practical application of the knowledge transferred to them.

A better strategy would be as follows. Give a short, initial training period, focusing only on how to perform a few key processes, getting onboarded, and to focus on the big picture sales (or marketing or customer success) strategy. But do NOT focus too much on getting every process right immediately. As mentioned, forgetting as soon as the initial training period ends is an issue.

Once the initial training period ends, focus on a **performance support** strategy. Performance support technology helps to put forward the accurate information and admittance to that information into the hands of your personnel, at the most appropriate time as and when it is required by them.

Performance support technology is basically aimed at arming your workforce with some tools so as to increase their output on the whole and help them to successfully perform the job assigned to them. It is objected to provide the most suitable quantity of task leadership, help and efficiency benefits to the employee exactly at the time of need.

Instead of extensive classroom sessions and long video tutorials, employees are placed on the front lines and work a typical day. They are then given tools that help them tackle practical tasks and learn how to address them in real time, exactly in the moment of need. There are certain programs out there that are designed for this specific purpose, and can be paired with other training techniques to promote a faster learning phase.

Bonus Tip:

Utilize software like [WalkMe](#), which provides direct and onscreen assistance in the exact moment of need. WalkMe provides a series of real-time instructions that enable the user to successfully learn and perform any software task, no matter how complex. This allows users to get up to speed to by working quickly, while still being able to quickly and simply retrieve necessary information when they need it.

Due Diligence:

There needs to be due diligence, meaning give a test, to make sure people have been paying attention. Close monitoring of user success, particularly in the early stages – provides a good analysis of what seems to be working well and where there remains room for improvement.

Demonstrate Value:

A key point, though, is to make sure that training directly correlates to task performance. Make sure it is not too theoretical or complex. Keep it simple and directly relevant to

Make sure that training directly correlates to task performance.

WalkMe, platform also provides a valuable tool to complementation traditional documentation, by providing a long-term self-help tool for users to receive direct assistance, without having to break from momentum to wait or search for help.

When the system goes live, it is necessary to deploy a monitoring system

Use analytics to measure performance, to spot trends, and to make forecasts

everyday tasks. In that way, managers and employees will succeed.

Documentation & Support

The Basic Principle:

Build Documentation into Signoff Process; Use Social-media as Support Tool

Build it In:

Most people do not like to do documentation. So it should be built into the signoff process.

Social Media:

The documentation system should include a social media type interface, so that it becomes a tool for ongoing support. This lets people post questions and issues online and have coworkers or vendor support people respond using a Facebook like presentation. That is easier than using the phone and more reliable than email.

Returning to [WalkMe](#), the platform also provides a valuable tool to complementation traditional documentation, by providing a long-term self-help tool for users to receive direct assistance, without having to break from momentum to wait or search for help.

Monitoring & Analytics

Monitoring:

Deploy a monitoring system for uptime and security.

When the system goes live, it is necessary to deploy a monitoring system to make sure that all the interconnected applications are working within thresholds and are up and running and not being hacked.

Analytics:

Use analytics to measure performance, to spot trends, and to make forecasts

The transactional data that the system accumulates over time is a treasure trove of information that can be used to find statistical anomalies (meaning operating outside norms), spot trends, and make forecasts. This helps with business strategic planning and can determine whether the system is operating in optimal fashion and delivering promised improvements in productivity.

Bonus Tip:

[WalkMe](#) Analytics also provide comprehensive monitoring and analysis of user performance in software onboarding. Which tasks have they required assistance? How long did it take for them to master that function? How many steps were required? WalkMe Analytics is an indispensable tool in finding these answers, and as a result, will enable managers to customize performance assistance to meet each employee's needs.

Bonus Tip:
WalkMe Analytics also provide comprehensive monitoring and analysis of user performance in software onboarding.

Conclusion: Bring it All Together

In sum, implementing a new software is best done by following the best practices adopted by other businesses and organizations and keeping it simple. There is the need for executive sponsorship and steering committee oversight. One needs a strong team leader. Because a new system needs to be integrated with other systems, there needs to be a systems

Testing is paramount; document, training, and ongoing support are critical. One

integration effort. Testing is paramount; document, training, and ongoing support are critical. One should deploy software to monitor the system for reasons of security and reliability. Finally, the data accumulated over time should be subjected to analysis, so that it can yield valuable business insights.

About WalkMe

[WalkMe](#) gives SaaS providers an indispensable tool to onboard trial users and to "be there" with existing customers. Leveraging the WalkMe interactive self-guidance technology, SaaS providers can ensure their prospects and existing customers have a simple, smooth & burden-free experience with their software, thereby increasing usability, eliminating confusion and frustration.

SaaS providers use WalkMe to increase free to paid conversions, reduce churn rates and highlight new features. Customers of WalkMe report lower acquisition costs, as well as reduced training and customer service costs.

Through a series of interactive tip balloons overlaid on the screen, tasks are broken down into short, step-by-step guided instructions, which help users act, react and progress during their software usage. As a result, SaaS providers can feel assured their customer will be able to focus on what they want to do using your software, and free from the confusion of how to do them. They can also empower their customers to self-task successfully even through the most complex processes.