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walkme

Deloitte delivers **digital adoption at scale**, helping to reduce support tickets **by 30%.**

30% reduction in employee support tickets

Nearly 100 applications with WalkMe deployed

14+ member Digital Adoption Center of Excellence

> **"** Adoption of our technology solutions is critical to achieving return on investment. WalkMe helps with that adoption by engaging our employees directly within our internal applications and providing just in time guidance, which increases self-service and adoption and reduces support tickets submitted to our internal applications. **"**
>
> **Doug Beaudoin**
> Chief Information Officer, Deloitte Services LP

Executive Summary:

Deloitte provides industry-leading audit, consulting, tax, and advisory services to many of the world's most admired brands—and the organization always looks for ways to innovate its tools, processes, and technology. In 2019, the company introduced several new technologies that its professionals needed to learn and start using quickly, while limiting time spent away from their clients. Rather than requiring significant time spent in a physical or virtual classroom setting, Deloitte turned to WalkMe's Digital Adoption Platform to provide guidance within the flow of work in the new applications.

After seeing success on their first WalkMe implementation, Deloitte recognized that the potential of digital adoption solutions went beyond onboarding and in-app support and included automating processes, simplifying cross-application workflows, and delivering just-in-time support and updates to applications. To drive change at scale, Deloitte developed a WalkMe Center of Excellence and has deployed WalkMe to nearly 100 applications that touch all areas of its U.S. based business.

With strong results, including an overall reduction in onboarding time and a 30% reduction in support tickets, Deloitte continues to expand its digital adoption footprint with further automation and data-driven improvements, freeing Deloitte professionals to focus on what they do best: delivering best-in-class services to clients.

The challenge
Allocating significant time to learn new technologies limits the time available to serve clients

In 2019, Deloitte introduced several new technologies as part of a larger digital transformation and shift to the cloud, which the company's professionals needed to learn while maintaining the highest level of quality for their clients. For example, Deloitte's audit and tax professionals historically spent three full days learning in a physical classroom when they shifted from one system to another. But as a leading professional services provider, the company wanted its people to have more time in the field, supporting clients.

"When you meet with a client, you're focused on bringing your best self and your professional judgment," said Laura Nicholls, Senior Manager of Learning and Development at Deloitte Services LP. "If on top of that, you have to learn a brand-new, end-to-end software platform, the stakes are high."

When the COVID-19 pandemic started, the company needed to pivot to a fully virtual learning experience, which Deloitte sought to automate for its U.S. based professionals. As the company evaluated its needs and strategy, it began seeking innovative technologies to improve user experience across enterprise applications and increase the operational effectiveness of its workforce.

"In learning and development, we're always challenged to find innovative ways to deliver the knowledge and skills our professionals need to do their jobs effectively," Nicholls said. "Looking at ways of digitally providing those kinds of learning experiences to our professionals and enabling them to self-serve was crucial for us."

"As consultants, we want to put our people in the field working on projects, helping our clients," added Jason Friedman, Digital Automation Program Lead at Deloitte Services LP. "To streamline that whole training process, we needed to eliminate documentation and video lectures. By integrating learning in the flow of work, directly on the application, we knew our professionals would be able to spend more time in the field with our clients." Deloitte set out to ensure that its professionals had the knowledge and skills they needed to do their jobs and serve their clients effectively.

The solution
Deploying digital adoption solutions at scale creates impactful digital experiences for end users, while providing users just-in-time guidance and self-service support at the point of need

Deloitte evaluated new user experience technologies to integrate in the flow of its professionals' regular workday. They looked for a platform that enabled low-code updates and met crucial compliance and security needs. "We service the federal government and Fortune 500 companies, so security and functionality are essential for us," Friedman said.

The team decided to pilot WalkMe with a small group of employees, first integrating with Deloitte's new auditing software. The WalkMe integration provided in-app learning and development support in the form of navigational overviews and step-by-step Walkthrus to help make the change to the new software frictionless. The onscreen guidance meant that the quality they delivered to their clients remained as high as possible while its professionals adapted to the new tools.

Based on the results and positive feedback from the pilot, Deloitte rapidly expanded its implementation of WalkMe across its U.S. business entities, from consulting and advisory to audit to tax, as well as its shared services. WalkMe is now integrated with almost 100 applications in 19 languages, including large enterprise systems as well as niche applications and analytics dashboards. Deloitte has established a Digital Adoption Center of Excellence to manage high quality deployments across the Deloitte digital ecosystem.

Widespread implementation allows WalkMe to guide employees through individual applications and processes, or seamlessly through a workflow across multiple applications. "Automation has been critical in streamlining a number of workflows and ensuring accuracy," Friedman said. "We utilize the full range of WalkMe's tools, including SmartTips, Launchers, Shuttles, and APIs, which can trigger an automated WalkMe flow to complete a task an employee started."

Deloitte continuously improves its digital adoption solutions. For example, the team implemented ActionBot to further simplify professionals' experiences; now, using the ActionBot, employees can ask questions directly in-app in a natural language interface to find the support they need, whether it's to complete a process or find an asset.

In addition to seeking feedback from users, Deloitte uses WalkMe Insights to understand their users' behavior in the underlying application. By analyzing key factors, the team can discover which areas of a platform are most challenging for employees, targeting improvements to WalkMe that will have the greatest impact. "Insights gives us critical information, enabling us to understand how professionals are using our systems and how we can deliver an even better experience," said Erica Seamans, Manager of Learning and Development at Deloitte Services LP.

WalkMe's ability to evolve and update quickly based on industry policy updates and underlying system updates is also key. "My favorite thing about WalkMe is how agile and flexible it is to changes in technology," Seamans said. "If there's a hotfix that impacts our end users, we can update WalkMe immediately and give our users accurate support."

The benefit

With continued collaboration and innovations in digital adoption, professionals have more time to provide best-in-class services to their clients

As a leading provider of significant change management solutions, Deloitte knows that adoption of technology solutions is imperative to success. "Adoption of our technology solutions is critical to achieving return on investment," said Doug Beaudoin, Chief Information Officer at Deloitte Services LP. "WalkMe helps with that adoption by engaging our employees directly within our internal applications and providing just in time guidance, which increases self-service and adoption and reduces support tickets submitted to our internal applications."

With their digital adoption platform-focused approach, classroom learning for the auditing software use case was reduced from three days to just three hours—an over 80% increase in time-to-proficiency. On applications that once had a high volume of support tickets, Deloitte has seen a 30% deflection rate for ticket requests. "WalkMe has been a game changer for us. By providing step-by-step instruction and answering professionals' questions within the interface, our professionals complete tasks correctly on the first try," Nicholls said. "That removes the risk of error in the system and gives them time back to do what they do best: bringing their professional judgment and valuable insights to our clients."

"WalkMe enables us to hyper-automate by taking as many tasks as possible off employees' plates," Friedman adds. "We automate the onboarding process, deflect support tickets, and even make changes with no code, directly on the application. That in turn reduces our costs because we don't have to develop the application from scratch. You don't need to be an expert developer to create content."

In keeping with its values of constant improvement and transformation, Deloitte's Center of Excellence has enabled the company to scale WalkMe solutions across its enterprise applications. Dozens of team members are now dedicated to building digital adoption solutions on deployed applications.

"When we have ideas, we collaborate and see how WalkMe can make it possible," Seamans said. "In that sense, it's not just a software solution that we found in WalkMe, but a collaboration that takes our professionals' performance and the service to our clients to the next level."

WalkMe has brought the learning and development team the opportunity to not only try new innovations, but also to receive recognition for them. Nicholls and Seamans won a [Brandon Hall Award](#) for their usage of WalkMe on the auditing software. "It was fantastic to be recognized by an industry leader," Seamans said. "We were able to show through data how much the new learning experience impacted our professionals' availability to do what they care about doing, rather than just learning how to use a new platform."

What's next

Deloitte continues to enhance their implementation of WalkMe. "We want to simplify the process and provide guidance from start to finish for anyone who might need to learn several applications at once, or anyone who has to use multiple applications to complete one workflow," Friedman said.

The team also intends to automate more repetitive tasks, so professionals don't have to manually enter their responses. They will also enable product owners and specialists on other teams to use WalkMe, so they can provide a streamlined experience for their end users without having to go through a full development cycle. "WalkMe has allowed us to be fully aligned with Deloitte's vision to be digital, which differentiates us from our competitors," Nicholls said. "WalkMe gives us the support and the tools needed to enable our professionals to bring their best selves to their clients."

Realizing the value to their own employees, Deloitte formed a strategic alliance with WalkMe in 2021 to deliver digital adoption solutions to their clients. Developed in conjunction with WalkMe, clients can leverage these services to drive long-lasting digital adoption and realize the rapid results that digital transformation strategies can deliver. "We already have so many examples of how WalkMe works on enterprise platforms internally," Friedman said. "We can share our depth of knowledge and lessons learned with our consulting team, who then share this information with our clients."

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