

How a global petrochemical company improved its operations and delighted its staff through digital adoption

Client:

One of the largest global petrochemical producers uses Salesforce Lightning® as their CRM. To generate their contracts, they use SpringCM®, a document management system, which is integrated into the CRM. Ideally, this integration provides an end-to-end contract solution.

Our role:

We Created Mini-Menus to appear at logical places both before, during and after key activities - based on our knowledge of how Sales staff interact with Salesforce

- Automated frequently, to reduce clicks and avoid common confusion points.
 - i.e pre-filling the contract type selection to ensure the right contract is always selected,
- Sub-divided such processes into sections, with effective encouragement to complete the following sections, to avoid “user fatigue” from long processes,
- Contextual smart tips to ensure data accuracy isn’t disrupted.
 - i.e. when we could identify default Salesforce field values we reminded the user to ensure this value is relevant for a given scenario.

Results:

It was important for us to enable the client to create goals and measure their adoption success rates on a regular basis. The results revealed that 90% of users interacted with our WalkMe solution within the first three months of release. Of those users, their average number of interactions with WalkMe was 40. Making it clear, that the solution didn’t just act as a once off learning tool but as a regular work efficiency support tool.

Appreciating the whole methodology

“We really appreciated that PwC Israel uses a tried and tested adoption methodology. They expanded our knowledge of what WalkMe was capable of and presented a solution that went beyond our initial expectations.”