



LEVERAGING DIGITAL  
ADOPTION PLATFORMS  
FOR TRANSFORMATION  
& CHANGE MANAGEMENT



**WHITEPAPER**



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## **DIGITAL ADOPTION BY MYGUIDE**

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## EXECUTIVE SUMMARY

Businesses are increasingly moving to a work-from-anywhere model. With training knowledge retention at all-time lows, business leaders are looking for ways to help their teams use software and well-designed processes competently. With the rapid pace of change in technology, processes, and requirements placed on the workforce, organizations struggle to realize the promise of Digital Transformation (DX).

MyGuide by EdCast is the best-of-breed Digital Adoption Platform (DAP) on the market, empowering organizations to realize value from their Digital Transformation (DX) initiatives. DAP solves the challenges in training the workforce, providing assistance on-the-job for both software and processes used in the day-to-day activities in today's globally.

Organizations can leverage MyGuide infrastructure to build, maintain, publish and consume training modules, process walkthroughs, and guides in a single system.

**“Digital Adoption is no longer a choice. It used to be nice-to-have.... but now it is a must-have.... In the areas where we implemented MyGuide, we see about a 60% reduction in call volumes. “**

**- Sandip Patel, Associate Director  
HR Tech, Abbvie**

This whitepaper is intended for business decision-makers, IT managers, implementation architects, transformation leaders, change managers, instructional design leaders, and frontline managers focused on digital transformation initiatives. By leveraging MyGuide - enterprises can maximize the return of their IT investments by improving product and process adoption by the workforce. This whitepaper showcases the best practices and use-cases to improve the ROI of the digital adoption infrastructure.

# OVERVIEW

DX is potentially the most significant change in organizations today. Over the years, business executives have come to understand the importance of encompassing and aligning People, Processes, and Technology to put in place a fully digital operational model. However, the pace and scale of change make it difficult to realize the value of the DX efforts. McKinsey reported that over 70% of DX efforts fail to deliver the promised value.

DX leadership (CIOs, CTOs) and operational managers are under tremendous pressure to deliver services that increase employee productivity, enhance experiences and improve satisfaction.

Digital Adoption Platform (DAP) is a category of technology that helps users get software-proficient easily and quickly. These capabilities help organizations train, guide, and assist users to quickly, easily, and intuitively leverage technology to complete tasks. By truly simplifying and speeding up both employee and customer experience, organizations are able to fully realize the benefits of their Digital Transformation initiatives. Organizations are able to see improvements in efficient technology usage, employee productivity, and a reduction in customer support leading to better employee experience.

Digital Transformation through MyGuide comes from a single infrastructure encompassing the two complementary modes of operation: Creator and Player.

When trainers, power-users, frontline managers, and experienced employees perform the steps needed to complete a task with MyGuide capturing the entire benchmark operation: It is operating in the Creator mode. In this mode captured creation can be annotated, tested, edited, and published for the end-users using the currently used LMS infrastructure or directly on the desktops.

Customers, users, partners, and stakeholders can then consume the learnings in a training, through a portal or on-demand; that is MyGuide operating in Player mode.

## Produce: Create Mode

Creators of tomorrow will be any subject matter expert able to improve organizational operations. With MyGuide Create Mode tools, trainers, managers, subject matter experts will have the ability to quickly produce high-quality byte-sized how-to videos for consumption by onboarding programs; on-demand training; as well as on-the-job guidance. Producing quality content with MyGuide is as easy as mastering three elements: Messages, Capture, and Navigation.

## Captures

Users respond well to visual cues. MyGuide empowers Creators to capture static screenshots or dynamic animated steps with the simple and intuitive control panel. Captures can be annotated or highlighted using animations demonstrating actions that users can mimic to not only understand the app but complete the task at hand. By leveraging breakthroughs in Computer Vision, MyGuide provides smart and dynamic placement of highlights and annotations ensuring a seamless and intuitive on-the-job learning experience both during Create and Player mode.

## Messages

Micro-instructions or simple explanations go a long way in helping users utilize a new desktop app or a feature or the process of accomplishing a task. From capturing the attention, instructing on the steps all the way to predicting outcomes; Creators can use a message to guide users through the application. MyGuide Messages can be call-outs, pop-ups or instructions that display visual text or speak-out for a rich user experience. Creators typically use Messages for introductions, focus attention on a feature, function, or task, provide the outcome of the last step, indicate the expectation of the



current step and provide guidance on the next step. Based on the complexity, experience, comfort, culture, and criticality of the workflows, Creators can introduce the right number and detail of messages to make learning and walk-throughs useful and interesting.

## Navigations

Navigations are structured paths from the start to the end of a workflow. Creators can combine captures and messages in the most intuitive Navigation to demonstrate how the application is to be used for a particular situation or the process to be followed to accomplish a task.

Combining just these three elements, creators can produce top-notch content simply by performing the steps necessary to complete the task the users are being trained on. Learning to use a product effectively—in the context of the job has never been as easy as with MyGuide.

MyGuide streamlines the content creation process with four easy steps. Creators can produce, test, refine, and improve training videos, walk-throughs, and guides in a matter of minutes with the simple and intuitive control panel. This enables quick publication and deployment of the content so that end-users can benefit from better use of the investments in desktop apps with the click of a button.

## Consume: Player Mode

MyGuide sits on every single computer and browser in your organization available to assist users at the touch of a button. Whether it is in the context of onboarding, anytime training, scheduled training, or on-the-job guide. Users can access content in the context of the jobs to be performed when they need it, in the most intuitive manner.



# GETTING STARTED WITH MYGUIDE

As MyGuide works with several forms of deployment—browser extension, desktop-app, installed with ISV application or built directly into the website itself; IT administrators will work with MyGuide professionals and business owners to choose the right model. MyGuide deployment team will work with your organization to plan and deploy MyGuide with minimal disruption to your operations. IT administrators can leverage the tools and technologies they have at their disposal to manage MyGuide and configure it to work with popular HRIS, CRM, LMS, ERP, service desk, and home-grown systems in use.

Once the system is set up, subject matter experts (SMEs) will take on the responsibility of using the MyGuide creation and management tools to set up, deploy, track, and improve the end-user adoption of the systems. Once your IT department has pushed the players to end-users, SMEs can publish role-specific, app-relevant content that will be distributed automatically to the appropriate end-users in the correct context.

## Success with MyGuide

To deliver on the promise of improved employee experience, organizations need the ability to

- Create compelling, useful, and relevant content
- Publish content across their mobile, cloud, desktop, and laptop infrastructure
- Surface published content at the time of need
- Track, measure, and benchmark operations for ongoing improvement.

MyGuide DAP consists of the omnichannel DAP platform to store, maintain and publish the content for consumption across all your infrastructure and authoring tools to help trainers, managers, and transformation agents build the guides that help end-users perform their tasks better. In addition to these essential components, the MyGuide platform has advanced services to track operations so that organizations can operationalize the Learn-Use-Improve virtuous cycle.

MyGuide empowers organizations to help users adopt new applications or new features quickly and more effectively. The first problem encountered by any new deployment is locating the features and functions of the new deployment. From popular ISV apps to home-grown apps, It is now a best practice to include a product tour to welcome users into the application or bring attention to the new capability.

## New Application/Feature Deployment

110

Average number of apps in a business\*

30

Categories of business apps

38%

Increase in the number of apps in business since 2020\*

Whether deploying an enterprise app for functional organizations like HR, sales, services, operations, IT, analytics, workforce management, security, collaboration, or a fundamental application for up-and-coming business; learning the features and functions of the technology remains a challenge. MyGuide platform enables businesses to build comprehensive web, and desktop app tours quickly and easily. Businesses can go further and push the tour to the relevant users, force completion, and keep it available as a reminder when necessary.

Creating a tour is a simple four-step process:

- 1 Welcome or Introduction screen providing a one-sentence description of the use and utility of the application for a given role.
- 2 Step-by-step exploration of the surface area starting with the top left staying at the topmost level of the UI hierarchy.
- 3 Adding text-to-speech to improve the accessibility of the content.
- 4 Adding feedback form.

### Welcome Screens

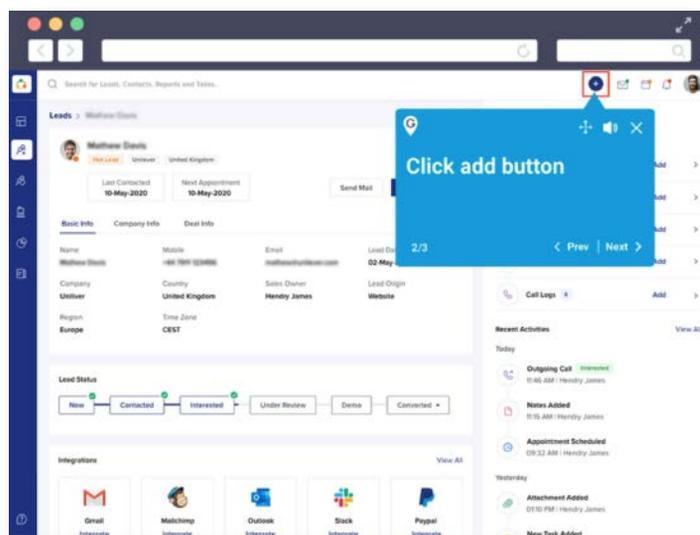
In a world filled with content, the welcome screen is your opportunity to assert the authenticity, relevance, and utility of the source of the information provided in the following set of instructions. Some of our best customers use the welcome screen to verify that the information provided in the tour is

- Created by the subject matter experts within the organization
- Created for the role/department for the purposes of meeting the business function
- Commitment to improving the experience from the learnings within the organization.

Most ISV-generated tours are highly generic, consider a wide range of roles, and cater to the needs of meeting the activities across the board. By asserting the relevance, specificity, and authenticity; organizations can simplify the onboarding experience, consider customization in the welcome screen, and ensure the tour is short and memorable to the end-user.

### Step-by-step exploration

The most powerful aspect of building a role and a scenario-specific tour is the ability to include the steps relevant to the user getting started on the new job role.



The most popular method of showcasing the step is to highlight the area on the screen to bring attention, explicitly name the feature and explain the use of the feature.

### Text-to-speech

MyGuide provides the text-to-speech feature out of the box using the Titles and Descriptions for each step of the tour by default. As most of the text on the UI elements is designed for visual appeal, we recommend shortening the phrases in the voice-over for a truly conversational style of a tour. Typically, spoken sentences are short, convey one message at a time, and use punctuations liberally.

Adapting the step descriptions to adhere to this format helps users follow and remember the features so that they can be found easily on subsequent visits. This is critical for applications that do not see a high volume of user activity but is deemed critical when it is absolutely invoked.

### Feedback and Sentiment

The most important aspect of any organizational training and adoption operations is the feedback mechanism to measure and improve the end-user experience. Our

customers leverage two distinct types of measurement to gather operational and experiential feedback from the user.

Creating a tour is a simple four-step process:

**1** Feedback on the relevance and usefulness of the content, process, and mechanism towards task completion. With questions such as

- “Was this tour relevant to your role?”
- “Was this tour clear?”
- “Was this tour enough to get you started?”

**2** Sentiment of the users can be measured by asking to rate the tour on a scale

- “Do you feel this tour was useful?”
- “How likely are you to recommend this tour?”
- “Rate your satisfaction with this product”

By leveraging these four steps, businesses can quickly get users familiar with new products, new features or adopt new

## Reduce Existing Enterprise App Support Costs

From well-entrenched enterprise apps like Microsoft Office to functional workbenches like Salesforce, Oracle, and SAP; organizations, ISVs, and customization vendors are investing heavily in delivering higher value for users. As the business environment changes, organizations restructure, and users learn to use complex general-purpose apps for new workflows, there is a marked uptick in support volumes as users try to locate features, descriptions of the fields, and the correct values to be entered by users during various tasks.

MyGuide’s next-generation digital adoption platform can help your teams find their way around complex general-purpose enterprise apps. MyGuide can help users learn the new user interface in the context of your operations manual. From locating built-in features to business-specific customizations, businesses can ease the requirement to search for information on completing tasks. By using features like beacons, tooltips, tours, guides, and automation within the application; users can maintain the familiarity of the tool, the confidence of navigating the task, and trust their intuition in following the operating manual.

### Tooltips

Although ISVs and home-grown developers place small question marks in a circle or (i) icons all around the UI to describe the field of an online or in-app

form, the descriptions are functionally inadequate. Without going back to the ISV or through a development cycle, frontline managers could not help end-users fill in the correct information.

MyGuide tooltip feature enables SMEs, training managers, and frontline managers to insert business, task, and role relevant descriptions for all the fields in complex enterprise applications like Salesforce, Oracle, ServiceNow, SAP, and more. You can describe the use, the acceptable values, and the process to follow so that accurate information is used in the flow of work.

### Beacons

While tooltips provide descriptions of fields, acceptable use, and/or steps to take to eliminate manual errors, Beacons are custom official icons placed on the UI to draw users’ attention and eliminate searching for a UI element in the context of the task being performed. Customers have been successful in eliminating a lot of search and support requests that start with “Where can I find..” by implementing Beacons within their internal applications.

Beacons are versatile elements introduced in production applications to highlight new features, showcase better and easier ways of accomplishing tasks, and change user behavior without the long cycles of code change. The use of these small and powerful elements is often reported along with a huge jump in productivity and data accuracy. A recent healthcare customer deploying beacons exclusively in a payroll app has observed about 500% higher accuracy in the use of the application compared to the time without the use of this technology.

By leveraging just these two simple functions as a part of the digital adoption platform, some of our customers have experienced a drop in support volumes by as much as 60 percent across their CRM, HCM, and other home-grown line-of-business applications.

### New Employee Onboarding

Some functional organizations are prone to a high churn rate compared to the rest of the organization due to a large variety of factors ranging from the market to employee behavior. Onboarding is not a simple task by any means. It might take several weeks for competent professionals to explore and learn the unique methods and means used to perform their job functions.

Organizations leverage MyGuide to Onboard new employees to familiarize themselves with systems like Salesforce, ServiceNow, Workday, and several in-house business applications. By building a checklist of tasks to complete on Day One, MyGuide can ensure that employ-

ees are not only familiar with the intranet, but also complete some of the requirements of their role. This may include exploring the systems, configuring and customizing their presence on the intranet with pictures, bio-data, contact information, etc, to completing mandatory training.

## Guides: a Sales Playbook

A majority of B2B sales professionals are experts in sales enablement platforms like Salesforce. With thousands of features and hundreds of customizations, sales enablement software can be difficult to navigate.

By leveraging MyGuide Tours, sales enablement teams can build customized tours to inform and align the use of the technology in a manner appropriate to your sales operations. This includes the methodology, language, nomenclature, taxonomy, steps, and procedures of conducting activities required for the role. This helps new reps, account managers, systems engineers, sales operations and sales management stay in sync with expectations and adhere to best practices in day-to-day operations.

Of the thousands of features and data objects, sales-enablement can leverage beacons and tooltips to describe the use of fields bringing consistency to the use of the system. This helps improve the overall effectiveness of the technology, increases the quality of data collected, and enhances the ability to view and forecast the direction of the organizations with confidence. Further, as market demands change or special initiatives are set in motion, enablement teams can help change the operating procedures through in-app notifications, on-demand guides, beacons, and tooltips inserted in the flow of work.

MyGuide does not just stop there. All the training and onboarding material is available to search at any later point in time to refresh the memory or complete infrequently recurring tasks and workflows. The always-available information, help, assistance, and guidance eliminate the creation of support or service tickets reducing the overhead on your support infrastructure.

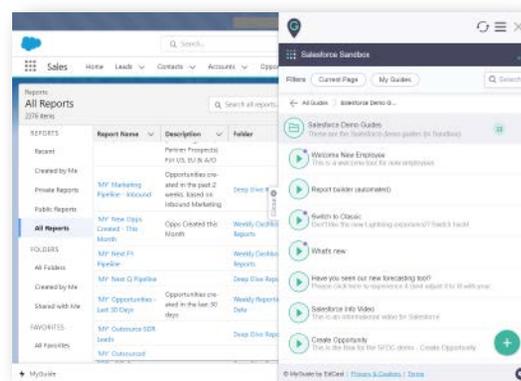
## Search: Technology Concierge with MyGuide

Complex general-purpose software systems used in sophisticated businesses add up to hundreds of thousands of features. While most users operate with a small fraction of the features, occasions arise where they need the capabilities to accomplish critical business or professional tasks. This leads to the two most common questions.

1. Where is...? Insert the feature or function name. And,
2. How do I...? Insert the task to be completed.

These questions can take one of several turns. Ask a coworker, Google search, Intranet search, search and explore product documentation, or raise a support ticket via a webform, chat, phone, or email. Add on the potential changes in software, customizations, integrations, feature replacements, and updates to the process and we have the perfect recipe for chaos and unproductive behavior.

MyGuide empowers IT, training, and change management teams to build, curate, and maintain a directory of answers that can be surfaced in the context of the task, searched specifically or generically using any of the earlier mentioned methods. Instead of a generic, ISV-supplied knowledge base, specialists and subject matter experts can use MyGuide to curate content and surface the information in a natural conversational or traditional search model.



Organizations can build and operate curated, fully functional, organization compliant, and authorized sources of information to help users complete tasks within the context of the job functions. By leveraging guides, beacons, tours, tooltips, and search across all the content modules, businesses can unblock hurdles that arise due to a variety of reasons. In addition to reducing support overhead, employees experience a high productivity environment.

## Courses: Training with MyGuide

Over the years, compliance training and adherence have evolved to fit the short-duration easily consumable modules that users can consume at any time. The key hurdle of surfacing the module remains a huge challenge to most organizations. Business and function leaders have to send emails, reminders, warnings, and threats to get employees to complete the tasks to meet compliance requirements. In addition to employee fatigue, a large organization has to endure productivity tax to push compliance.

Several customers leverage MyGuide to impose urgency in completing critical compliance requirements in the flow of work, eliminating the need for emails, reminders, warnings, and threats. By strategically leveraging notifications to complete one item at a time in the compliance checklist, leveraging multi-media content, and short-burst surveys, management can spread out compliance training at relevant points in the flow of work.

## Change Management with MyGuide

Most digital transformation initiatives require change. People, Process, Technology- The PPT framework is the most prevalent guide in IT transformation projects. In ideal DX initiatives, businesses look for three outcomes: increased speed, improved efficiency, and exceeded expectations. While a majority of resources are spent on development, implementation, and rollout, a mere 3% of the total budget is spent on training, learning, and adoption.

Digital Adoption Platforms like MyGuide provide the technical support to empower people to use the technology along with the processes prescribed by the digital transformation initiatives. This involves the creation of training collateral. These could be simple content like beacons and tooltips that point to and describe the functions performed by the technology or comprehensive content like in-depth demos and guides that explore and explain the use of the new system. MyGuide takes transformation further by tracking, measuring, and testing the system and providing views into both the operations and experience aspects of change.

## Search

MyGuide enables the creation, curation, and tracking of searches both from within the platform and on approved websites including Google web search. As users search for information on the new process, technology, or help on task completion, MyGuide tracks search activity and provides insights to transformation leaders. This information is useful in understanding shortcomings of the change management process and assists in the creation of help content.

Customers have leveraged this capability to place beacons, change descriptions for tooltips, add automated steps or hide distracting elements that insert errors into the new process. Taking simple proactive measures to assist users to complete tasks and following the new process has yielded huge gains across processes that

span mobile, web, and desktop applications. Leveraging the demand data from user behavior in pilot or early phase rollouts enabled transformation teams to build and deploy meaningful, relevant, and effective content elements for use during training and in the flow of work. End users reported higher satisfaction ratings and confidence in the value delivered by the new processes or technology due to this capability alone.

## Surveys

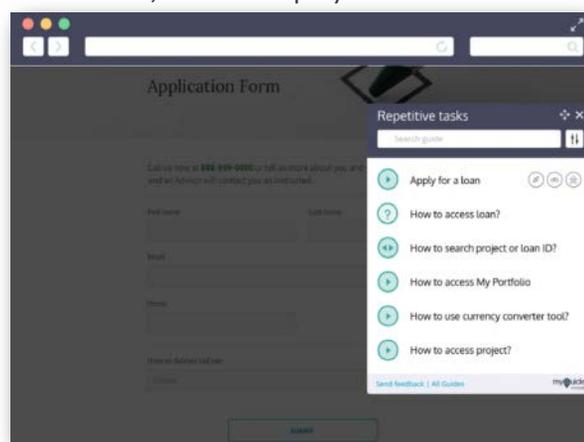
Closed-loop feedback systems help application owners and transformational leaders evaluate the effectiveness of the new process at every step of the way. Operation and Experience surveys are great mechanisms to collect this information along the way.

From the open-ended text, a simple star rating, single/multiple selections, and range response to Yes/No questions; MyGuide empowers post-application development embedding of surveys to track utility and sentiments. As the user follows the prescribed process on the technology, indicating the progress is both a simple and powerful mechanism to evaluate its success.

Several organizations leverage a combination of just six types of surveys to capture the operational and experiential data on the process. Although MyGuide provides the tools to build, deploy, and measure any form of customized surveys; most customers rely on simple mechanisms to gather the information that consistently indicates the health of the system. This is especially critical in the early days of change deployment where fine-tuning is essential to ensure the success of the initiative.

## Automation

At times, transformational deployments end up with manual workarounds to complete tasks leading to convoluted, repetitive, or error-prone workflows for end-users. While such tasks are logged and marked for future releases, current deployments leave room for



manual errors, improper process adherence, and imperfect data in the system. To overcome the challenges posed by the limitations of the current system, transformation leaders can leverage the lightweight automation available in MyGuide. From drawing attention to UI elements to following regimented, logic-driven, multi-application, and multi-step workflows; MyGuide empowers IT teams to keep focus, perform tasks, validate data, and take actions within the context of the task being performed.

## Insights

In today's data-driven age, high-level metrics do not capture the true operational and experiential status of any change initiative. Different stakeholders need different types of views for a wide range of purposes. MyGuide is able to track, consolidate, visualize, and surface custom views for different purposes originating in one operational and experiential dataset.

From pageviews, notifications, visits, invocations, and displays to survey completion and responses, the granularity of data collected can be fine-tuned and customized to match the business objectives of your organization.



Starting with simple tag tracking within a web or desktop application to sophisticated AI-driven intelligence gathering, MyGuide is capable of generating data from the user operation with a fine-tuned granularity. By leveraging machine learning and advanced prediction technologies, MyGuide is able to intuitively determine the direction and course of the workflow to make preemptive suggestions and offer assistance in near real-time. Every such intervention generates data that is then surfaced for the appropriate stakeholder committed to improving the overall employee experience. Customers have leveraged the data generated by MyGuide to complement application data and create operational and experiential insights that are not only actionable but effective in improving the

overall employee experience.

By tracking workflows and usage patterns, several customers have been able to leverage automation to reduce manual effort, eliminate costly mistakes, and add validations to ensure compliance with mandated policies. By leveraging customized dashboards, business line managers and transformational leaders are able to measure the ROI and unearth opportunities for future investments.

## DIGITAL ADOPTION BY MYGUIDE

Seamless adoption of any desktop, or web app implies effective use of the new set of technology tools by the users. Every single user should possess or build an understanding of the interface along with tacit knowledge of the process of accomplishing the task at hand. MyGuide provides the tools and technology that enterprises can use to support their employees during the introduction of new apps, implementation of new features, or adoption of new tools while managing the change process. Content producers can leverage simple tools built on powerful state-of-the-art Computer Vision technologies to create compelling omnichannel training, tours, and assistants that keep workforce productivity high. These tools work across all, web and desktop infrastructures to provide a single source of truth across your organization. Guides, walkthroughs, and content produced using these tools can be published securely and in a wide range of formats using the One-Click Publish mechanism.

MyGuide is used by hundreds of businesses across the globe to build a continuously improving organization. Using business-specific, role-based, personalized content at the time of need, employees are able to perform their day-to-day activities quickly and intuitively. If you are looking to realize the promise of digital transformation by truly improving customer and employee experience within your organization, MyGuide has a lot to offer.



# ACCELERATE YOUR DX INITIATIVES

MyGuide by EdCast can help you reap the benefits of your DX initiatives,

Visit <https://www.edcast.com/corp/myguide>

Let us demonstrate the power of Digital Adoption Platform <https://go.edcast.com/Best-DAP>

## TERMINOLOGY

**APP** Application

**DAP** Digital Adoption Platform

**Desktop** A computer based on Microsoft Windows or Apple Mac OS

**DX** Digital Transformation

**Platform** A major software environment, under which smaller application programs are designed to run.

**Workflow** An orchestrated and repeatable pattern of activity with a digitally identifiable start and end.

**Use-case** A situation, occasion, or instance in which a product or service could be used.

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