

# WalkMe Training

## *COURSE CONTENT*

### GET IN TOUCH



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## About Multisoft

Train yourself with the best and develop valuable in-demand skills with Multisoft Systems. A leading certification training provider, Multisoft collaborates with top technologies to bring world-class one-on-one and certification trainings. With the goal to empower professionals and business across the globe, we offer more than 1500 training courses, which are delivered by Multisoft's global subject matter experts. We offer tailored corporate training; project Based Training, comprehensive learning solution with lifetime e-learning access, after training support and globally recognized training certificates.

## About Course

WalkMe Training by Multisoft Systems is designed to help professionals master digital adoption strategies and improve user engagement across enterprise applications. The course provides in-depth knowledge of WalkMe's Digital Adoption Platform (DAP), enabling learners to create interactive guidance, automate workflows, and simplify software navigation for end users.

## Module 1: Introduction to Digital Adoption Platforms (DAP) & WalkMe

- ✓ What is Digital Adoption and why it matters?
- ✓ Overview of Digital Adoption Platforms (DAP)
- ✓ Introduction to WalkMe
- ✓ Key features and capabilities of WalkMe
- ✓ Use cases across industries (HR, CRM, ERP, Finance)
- ✓ Benefits of implementing WalkMe in organizations

## Module 2: WalkMe Architecture & Components

- ✓ WalkMe system architecture overview
- ✓ WalkMe Editor vs Published Environment
- ✓ Understanding WalkMe Snippet
- ✓ Components of WalkMe:
  - Smart Walk-Thrus
  - Launchers
  - ShoutOuts
  - SmartTips
  - Surveys
- ✓ WalkMe deployment models (cloud/on-prem integration scenarios)

## Module 3: WalkMe Editor Setup & Environment Configuration

- ✓ Installing WalkMe Editor
- ✓ Browser extensions setup
- ✓ Accessing WalkMe console
- ✓ Environment management (Test, Staging, Production)

- ✓ Version control and publishing lifecycle

## **Module 4: Smart Walk-Thrus (Core Feature)**

- ✓ What is Smart Walk-Thrus?
- ✓ Step-by-step creation of Walk-Thrus
- ✓ Element selection and positioning
- ✓ Adding steps, triggers, and conditions
- ✓ Best practices for user guidance
- ✓ Testing and debugging Walk-Thrus

## **Module 5: Launchers & SmartTips**

- ✓ Creating Launchers for user interaction
- ✓ Types of Launchers (Auto vs Manual)
- ✓ SmartTips creation and configuration
- ✓ Validation rules using SmartTips
- ✓ Enhancing user experience with contextual help

## **Module 6: ShoutOuts & User Engagement Tools**

- ✓ Designing ShoutOuts (pop-ups and announcements)
- ✓ Segmentation for targeted messaging
- ✓ Creating onboarding messages
- ✓ Engagement strategies using WalkMe
- ✓ A/B testing for engagement optimization

## **Module 7: Data & Analytics in WalkMe**

- ✓ Introduction to WalkMe Insights
- ✓ Tracking user behavior and engagement
- ✓ Creating reports and dashboards
- ✓ Understanding KPIs (completion rate, drop-off rate)

- ✓ Data-driven decision making

## Module 8: Segmentation & Personalization

- ✓ What is segmentation in WalkMe?
- ✓ Creating user segments
- ✓ Rule-based targeting
- ✓ Personalizing content for different users
- ✓ Role-based experience customization

## Module 9: Integration with Enterprise Applications

- ✓ WalkMe integration with:
  - CRM platforms (Salesforce)
  - ERP systems (SAP)
  - Web applications
- ✓ API and data integration basics
- ✓ Working with dynamic elements
- ✓ Handling iframe and complex UI structures

## Module 10: WalkMe Best Practices & Governance

- ✓ Designing effective user journeys
- ✓ Governance model for WalkMe deployment
- ✓ Content management strategies
- ✓ Performance optimization
- ✓ Security and compliance considerations

## Module 11: Testing, Debugging & Deployment

- ✓ Testing strategies for WalkMe content
- ✓ Debugging common issues

- ✓ Publishing WalkMe content
- ✓ Rollback and version management
- ✓ Monitoring post-deployment performance

## Module 12: Advanced WalkMe Features

- ✓ Automation using WalkMe Actions
- ✓ Advanced conditions and logic
- ✓ Custom JavaScript integration
- ✓ Multi-language support
- ✓ AI-driven automation in WalkMe