



# The playbook for intelligent digital adoption

How the right AI tech can transform employees' work experience for the better



# Contents

---

01 Introduction

---

02 Optimize onboarding with intelligence

---

03 Increase process completion with better user insights and support

---

04 Make it easy to drive strong governance and compliance

---

05 Power productivity through process optimization

---

## 01

# Introduction: The enterprise at an AI crossroads

When it comes to how employees work, the headlines and hype are clear: AI is set to be a gamechanger for [productivity](#), [efficiency](#), and [satisfaction](#).

Except in many cases, this isn't what's happening.

A new study by the [Upwork Research Institute](#) has some sobering findings: 96% of C-Suite executives surveyed said they expected AI to boost productivity in their companies, yet a massive 77% of employees said AI in the workplace has **decreased productivity** and **increased their workload**. What explains the disconnect?

In large part, it's because workplace managers at enterprises are thinking about AI in the wrong way. Merely giving employees a disparate set of AI tools isn't going to move the needle on productivity—and if it does, it will likely be the wrong direction. Employees left without support and expected to use unfamiliar tools that may not fit the context of how they work **are being set up to fail**.

There's a bigger-picture, better way to think about AI at work. It isn't just something for employees to use directly (although it's certainly that). It's also a means for IT and operations teams, internal product managers, and others who design how work happens **to fully understand, optimize, and better manage their employees' application and workflow experiences**. The best way to do that? Through an intelligent **digital adoption platform**.

## When DAPs become intelligent

**Digital adoption platforms (DAPs)** are pieces of software layered on top of another software product or set of products to help facilitate user proficiency. They do this by guiding users through key tasks and workflows.

Before the age of AI, the best DAPs worked by using a combination of product analytics, feedback, and in-app guides. Analytics allowed teams to get a view into how work was happening—who “superusers” were, where teams may be getting stuck, which products and features drove the highest ROI, etc.

Combining this with qualitative feedback, teams gleaned critical insights into the current state of work to build a better future state via process optimizations and in-app support. In-app guidance and notifications provide always-on, automated help to users to get them through key processes and adopt key features.

**With the power of AI, an intelligent DAP takes all these motions to the next level—while adding new capabilities.**

Not only can the right intelligent DAP use AI to surface key insights, it can help turn those insights into action by crafting data-driven support motions that empower employees to work better. All of this is powered by a full stack of analytics, including quantitative, qualitative, and visual data.

## Where do enterprises go from here?

With AI tools here to stay (and only growing in importance), enterprises find themselves at a crossroads: Will their AI strategy boost productivity, or hamper it? Strengthen satisfaction, or further frustration? The right strategy—and the right tool to execute it—will make all the difference in answering those questions and determine whether an enterprise gets ahead of the curve or ends up left behind.

In what follows, we'll outline a framework for building an intelligent digital adoption motion and go into what it takes to transform how work happens for the better. An intelligent DAP can radically optimize critical priorities for businesses, including:

- New and existing employee onboarding
- Process and workflow completion
- Governance and compliance
- Productivity

Let's dive into all four of these areas, beginning where new employees begin: onboarding.

## 02

# Optimize onboarding with intelligence

Something that has businesses most excited about AI is its ability to boost efficiency. An intelligent DAP helps IT, operations, and internal product teams take innovative approaches to age-old problems.

For example: What's the best way to get new or existing employees up to speed on new business processes and ways of working? It's easy to get stuck in a reactive model of processing support requests around business apps and tech because employees have forgotten a one-off training and don't know where to access the right documentation.

The result can be frustrated employees not living up to their potential. A [Gallup study](#) found that **only 12% of employees strongly agree that their employer does a good job of onboarding, and just 29% said they felt fully prepared and supported to excel in their new role.**

But with an intelligent DAP, businesses can easily go from reactive to proactive by embracing a model that equips employees with the right digital support from day one.

## The most powerful support comes from the most powerful data insights

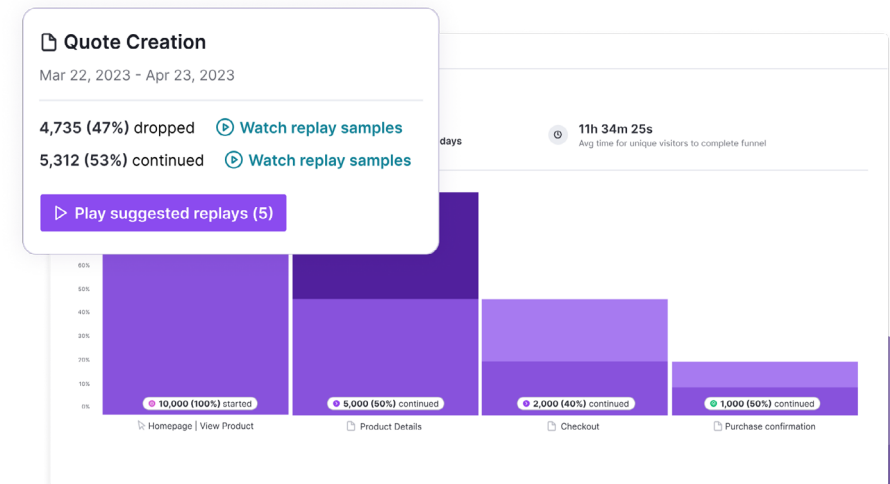
It's the norm for large enterprises to have globally distributed workforces, with teams spread across different time zones, or even different continents. Employees need support solutions that are flexible to their needs. One-off training sessions can be long and tedious. Employees start forgetting the session almost as soon as it's over and often don't know where to find the resources they need after the fact. Almost inevitably, they then find themselves needing to open support tickets when they hit a point of confusion since there's no in-app resource to help them.

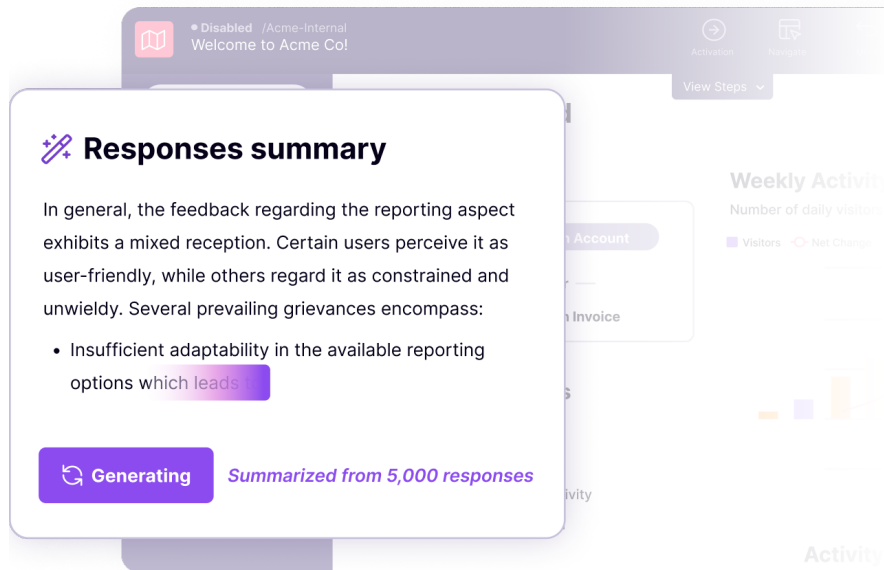
An intelligent digital adoption platform changes this dynamic, and can make copious support ticket backlogs a thing of the past. This tool has the power to optimize onboarding for employees regardless of their role or past experience.

Let's say you're part of an IT or rev ops team and want to optimize the onboarding for new sales reps on a platform like Salesforce. Where do you start?

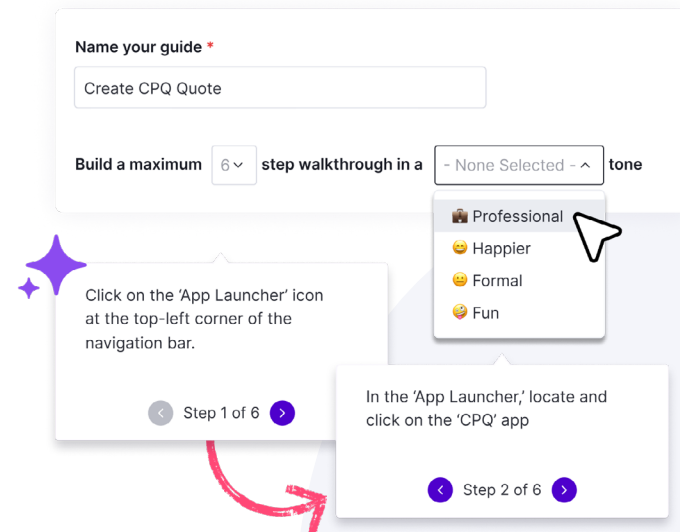
Well, a pillar of onboarding is to introduce new users to the features and workflows that matter most (creating an opportunity, the configure-price-quote process, etc.). With an intelligent DAP, teams can get AI-powered insights about how frequently current employees use features and execute given workflows. These insights can answer important questions:

Who are the “superusers” most effective at completing a workflow? What are common hurdles and drop-off points employees run into?





An intelligent DAP also provides teams an AI-powered synthesis of takeaways from qualitative employee feedback about the app or workflow. This is another critical means of shining a light on problem areas.



With these insights in hand, IT/ops and internal product teams can create an onboarding journey that highlights the features and workflows most essential to getting employees up and running fast, within and across apps.

## Iterate your way to even better onboarding

Once optimized onboarding support is in place, an intelligent DAP makes it easy for teams to iterate on that support and make it continually better. Its AI model can synthesize insights from analytics data pointing to areas for improvement in the support. It can also summarize feedback trends from employees themselves about how they feel about the onboarding experience.

Depending on what they find, teams may want to dig even deeper. With a session replay tool, it's easy to play back recordings of specific user moments to learn even more about how users are navigating a training. These capabilities allow teams to maximize onboarding effectiveness—and boost employee satisfaction and efficiency in the process.

### Tips for optimizing onboarding with an intelligent DAP



**Behavioral analytics are your best friend:** If you want employees to onboard successfully, you have to base trainings on how they actually use apps and where they get stuck, not on how you imagine work happens.



**Give employees a voice:** As the people on the frontlines of your apps and workflows, employees are your greatest asset in optimizing onboarding. Leverage your intelligent DAP to regularly collect and analyze feedback in real time about what's working and what could be better.



**Don't overload your onboarding experience:**

Design a training that focuses on the essentials—the must-have knowledge about the most used features and workflows. Trying to cover everything will leave employees feeling overburdened and underequipped.



# 03

## Increase process completion with better user insights and support

Following and completing processes is key to so many important outcomes—whether it's ensuring consistent services or data integrity, boosting efficiency, or driving scalability. As is the case with onboarding, the best way to improve employee performance here is with an intelligent digital adoption platform.

An intelligent digital adoption platform combines analytics, automation, and AI to help ensure employees complete business-critical workflows in ways that traditional DAPs can't. It starts with getting an unprecedented view into the current state of how work is happening—not only what your employees do but context on why they do it, all clearly visualized.

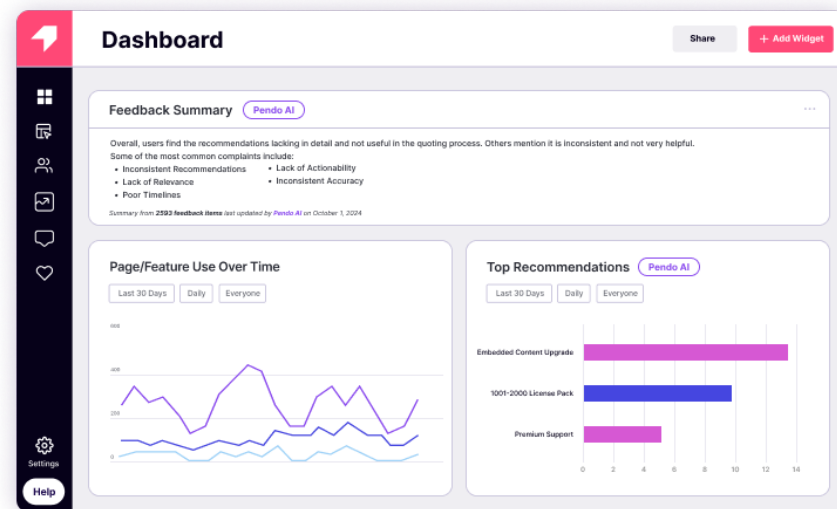
## Embracing AI as a partner in process support

With the right intelligent DAP, those who design business-critical workflows can leverage powerful AI as a partner. Teams need insights into what's hampering workflow completion before they can set about improving it.

An intelligent DAP makes it easy to manage an enterprise's diversity of employee roles, industries, experiences, and use cases—both in its analytical insights and the support motions it powers. When it comes to the former, an intelligent DAP spots signals in the noise to uncover problems hampering process completion.

And of course, there's almost never just one problem. Different employees may be struggling with completing processes for different reasons, depending on their role and experience. A rev ops manager would treat support for, say, a marketing employee doing a one-off search for account info in Salesforce very differently than they'd treat support for a regional sales rep who uses the app almost daily.

Powered by these insights, an intelligent DAP then helps teams build in-app guides and tooltips to support each segment in the right way—including superusers and other high performers, who can be left alone. Once guides are in place to walk employees through a workflow, teams can refer back to analytics dashboards to see how well they're moving the needle on process completion.



Depending on what they see, they can either iterate on in-app guidance and fix support that isn't working, or take what is working and make it even better. The result? Employees completing business-critical processes at a higher rate, at a faster pace.

## Tips for driving better process completion with an intelligent DAP



**Consider context:** What constitutes a business-critical workflow varies by context. Focus on improving recurring rather than one-off processes because of their frequency and impact on things like meeting revenue goals.



**Target your support:** Different users have different needs, and a strong intelligent DAP will surface insights about which are struggling to complete which workflows. It makes it easy to segment guidance by metadata (role, location) and behavior (whether it's a user's first time using an app, etc.)—and then target those employees with personalized guides.



**Iterate, iterate, iterate:** Improving process completion is a journey, not a destination. Leverage the continued power of analytics to get insights on what's working in your support vs. what's not to make the user experience even better.

## 04

## Make it easy to drive strong governance and compliance

Employees completing processes at a higher rate is a clear win. But businesses also need to ensure that they're completing those workflows in the right ways. In other words, they want to ensure that efficiency doesn't come at the expense of strong compliance. A PwC survey found that over one third of risk executives said compliance and regulatory risk presents the greatest threat to their company's ability to drive growth.

What governance and compliance at a company looks like can vary widely. If you're a director of data management, it may mean ensuring that company policies preserve data cleanliness. If you're a chief procurement officer, it may mean verifying that all business purchases meet the relevant regulatory requirements. For a chief compliance officer at a financial services firm, it means making sure employees abide by the multitude of industry regulations to avoid major legal fees and fines as well as broken client trust.

The position and specifics may change, but the challenge remains the same: How to drive governance and compliance across a large organization comprising different employees, with different needs, who work in different ways?

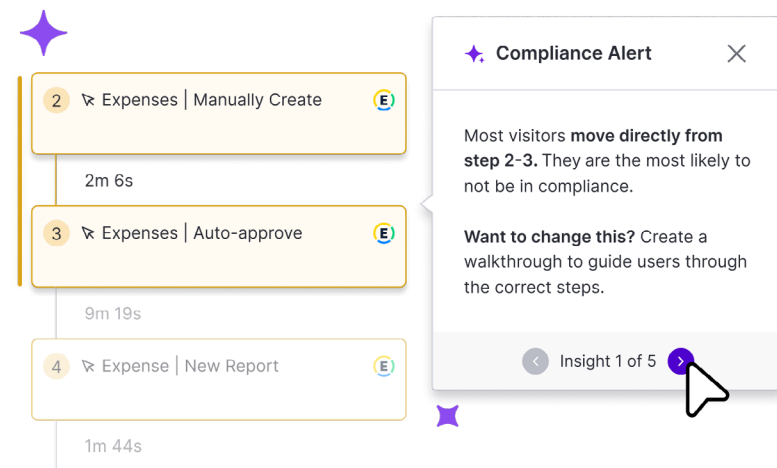
The short answer is: Make working in the right ways easier. Here again, the best path forward is to harness the full power of an intelligent DAP.

## The analytics-led path to better compliance

Compliance is essential to scaling business growth and operations. Employees who “go rogue” in how they use digital tools can lead not only to inefficiencies, but to other negative, even disastrous outcomes—everything from a damaged reputation to fines, contract breaches, legal action, and cybersecurity vulnerabilities. The stakes have never been higher.

Let’s say a business operations team wants to reduce risk and protect data integrity. An intelligent DAP rich analytics provides them a window through which to audit workflows in real time and see how (or whether) employees are inputting crucial data points into relevant fields.

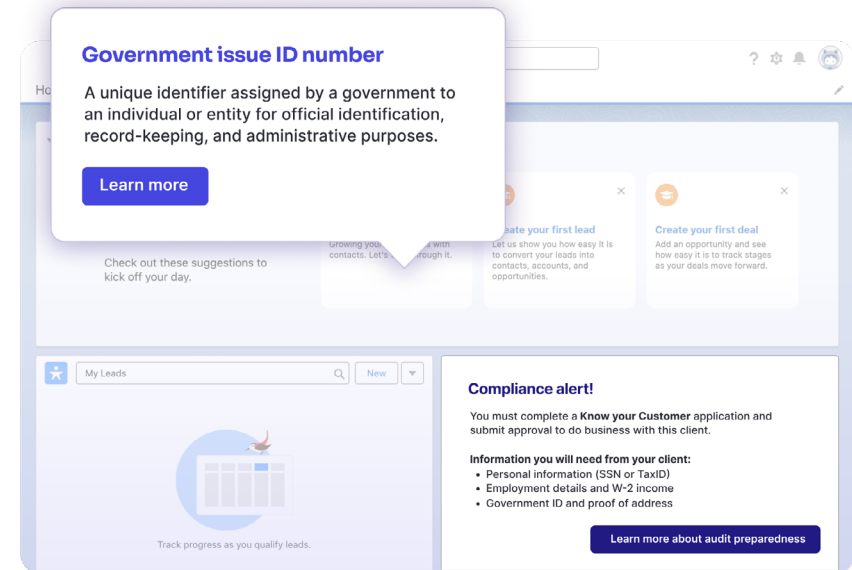
IT, security, and internal product teams get clear insights into compliance blockers and are able to answer key questions needed to remedy the situation. Are employees dropping off in a workflow? If so, where? Are they completing the workflow in the expected way? If not, what alternative steps are they taking? Are they filling out all required data fields? Powerful analytics, including detailed user path and funnel analyses, help reveal these and other pain points that hinder greater compliance efforts.



## Getting the right support to the right employee at the right time

An intelligent DAP harnesses the quantitative and qualitative data from analytics and user feedback to provide AI-generated insights that answer these and other questions. With the right custom-built machine learning (ML) model, IT and operations teams can get data-driven insights about what's hindering compliance. From there, they can easily build support motions that strengthen it.

The best way to deliver support to employees is in a way that's timely, contextual, and relevant. An intelligent DAP equips teams to easily create in-app and cross-app guides to walk employees through desired ways of working—AI can even suggest the right copy and guide step sequence for a given issue—making governance scalable like never before. This leads to stronger compliance, healthier habits, and a more robust governance framework for the enterprise.



## Tips for driving better compliance with an intelligent DAP



**Make it easy to be compliant:** Very often, employees may not be working a certain way because they're confused about it or don't understand why it's necessary. In-app guides and tooltips can give employees crucial context on why a best practice is what it is—and boost compliance in the process.



**Let insights power action:** An intelligent DAP will present AI-powered insights based off of qualitative, quantitative, and visual data about the actual state of compliance. Basing support on how work actually happens is critical if it's going to be effective.



**Audit support in real time:** An intelligent DAP makes it easy for you to build a custom dashboard to track how effective your support is in driving compliance on an app or workflow.

# 05

## Power productivity through process optimization

In the traditional way of thinking, businesses viewed productivity as a function of people—there were high performers, low performers, and everyone in between.

But with software going from being part of the workplace to the workplace itself, the most forward-thinking companies now understand productivity in a different way: It's still a function of people, but it's become more a function of process. In other words, if you want employees to be more productive, make sure the workflows and processes they regularly execute are well designed, intuitive, and easy to complete.

Workflow optimization is essential to maximizing employee productivity and building a better, faster organization. But as business operations and transformation teams know, the bigger challenge is knowing what needs optimizing. People never behave exactly like you hoped they might—but does that mean a workflow is broken? For example, does a given workflow simply need better, more personalized in-app guidance and support around it? Or is a radical redesign of the process itself required?



## Unlock productivity gains with the right insights and support

The truth is that process owners usually don't have good answers to these types of questions about how to improve productivity. They lack data and usually make decisions based on gut feel or word of mouth, which are historically unreliable sources. An intelligent DAP changes that.

Here again, an intelligent DAP's AI-powered analysis built on quantitative and qualitative data surfaces insights about how work is happening, and gives teams a benchmark off of which to set workflow productivity targets—often a target decrease in the amount of time it takes to complete a business-critical workflow.

SEGMENT	TIME TO COMPLETE
Sales (NA)	8m 33s
Sales (EMEA)	2m 38s
Sales (APAC)	13m 39s
Sales (LATAM)	24m 11s

The AI in an intelligent DAP can then assist the team in creating guides, walkthroughs, and tooltips designed to empower employees to be more productive. This always-on support helps increase productivity at scale, and an intelligent DAP lets teams continually improve it via analytical insights and employee feedback.

### Tips for boosting productivity with an intelligent DAP



**Think process, not people:** Conceiving of productivity more as a function of process optimization than individual performance puts you in a position to drive system-wide changes to make work easier and more efficient for all.



**Embrace a mindset of curiosity:** Don't be afraid to try things out. Leverage AI-powered suggestions and insights and make them your own as you solve the most pressing challenges within and across apps.



**Different employees have different needs:** The remedy for greater productivity is going to look different based on things like employee role, tenure, and experience. Leverage the powerful segmentation capabilities of an intelligent DAP to power support at scale.

An intelligent DAP is a critical tool for enterprises looking to boost productivity, compliance, and efficiency. When considering the right platform, make sure your selection meets the following criteria:



**Comprehensive analytics:** A strong intelligent DAP will provide comprehensive analytics to give an app-level, workflow-level, and portfolio-level view into usage and how employees behave. It should make it easy to understand everything from license utilization, to user friction points, to the time it takes to complete a workflow—all with AI-powered insights.



**Automated, AI-powered guide creation:** An intelligent DAP should offer AI-powered automated guide generation to help users through common workflows, such as generating a sales quote or updating a password.



**Personalized in-app and cross-app support:** An intelligent DAP should allow you to quickly segment users based on metadata and behavior, and target guides to the right teams at the right time with AI-powered support.



**Session replay:** The right intelligent DAP should let you dive deep into user behavior with playback of user actions. These playbacks provide crucial visual evidence to inform issue diagnosis and prioritization of support.



**Full-spectrum feedback management and analysis:** A strong intelligent DAP will leverage the knowledge and experience of employees themselves, capturing their feedback and forming AI-generated insights based on it to inform things like your internal product roadmap.



[www.pendo.io](http://www.pendo.io)

Explore Pendo for your employees.

[Get a custom demo →](#)