

HOW TO IMPROVE DIGITAL ADOPTION AND EMPLOYEE COMPETENCY WITHIN ENTERPRISE APPLICATIONS

*A buyer's guide to finding the right
Digital Adoption Solution*



INTRODUCTION

The deployment of new and innovative enterprise software applications, and the larger digital transformation initiatives these deployments usually are part of, holds the promise of bringing greater functionality, cost-efficiency, and productivity to the workplace. Yet, simply implementing a new application won't fulfill these promises. For starters, these applications are complex. They require a high level of training and sophistication to be able to use them competently and productively.

HR, Learning and Development, and IT all play a role in helping end users and their organization achieve the intended results from a software investment. However, with no automated way to document workflows or to quickly create the appropriate training materials to support end users in their flow of work, getting high levels of adoption and competency can be difficult.

Digital Adoption Solutions (DAS) have emerged in the marketplace to address the issue. Historically, these solutions were referred to as EPSS, performance support, microlearning, context-sensitive help, contextual guidance and a few others. While each of these solutions has the ability to help improve employee productivity, reduce errors and rework, improve compliance, and drive overall performance improvement across a user base, each vendor and DAS has different capabilities which can impact the results you experience when deploying a DAS.

To enable your organization to improve its ability to drive a better, faster learning experience, we've created this buyer's guide to help you select the right DAS for your organization. There are many factors that go into the purchasing decision. This guide will ensure you know how your organization could benefit from a DAS, what it can help you achieve, and what capabilities to consider.

Let's dive in!



46%



of companies say user adoption is one of their biggest challenges with a software implementation.[1]

#1



HR Tech Disruption: a new focus on tools for workforce productivity.[2]



CORPORATE LEARNING AND DEVELOPMENT IS UNDERGOING MASSIVE DISRUPTION



Over the last few years, corporate learning has been significantly impacted by the digital transformation of the modern workplace. From a new focus on tools for workforce productivity to the demand for more engaging, self-service types of learning, today's workforce wants more from the corporate learning experience than it's been getting.

A MISMATCH BETWEEN EMPLOYEE EXPECTATIONS AND BUSINESS NEEDS

While employees want a consumer-like experience at work – where digital interactions are engaging, personalized, and responsive – HR and learning and development teams have a different objective. They want employees to learn, and then go back to work.

Many Learning Management Systems (LMSs) have been trying to meet employee expectations by delivering a “Netflix-like experience.”^[3] While these types of learning models are more engaging, they still miss the broader point that end users should be learning as quickly and effectively as possible.

Industry expert Josh Bersin points out that it's important to remember that corporate learning has a different objective than music and TV. “We don't watch learning to be entertained; we watch it to really learn something. We don't want people to [become] addicted to the learning platform – we want them to learn something, apply it, and then go back to work,” he says.^[4]

Bersin believes that to bridge the divide between what employees want and what employers want, a new learning paradigm is emerging – one that focuses on learning in the flow of work. And, learners agree. In a LinkedIn research report, 49 percent of learners said they want to learn in the flow of work.^[5]

“What we ultimately want to do is embed learning into the platform in which [people] work, so the systems can coach and train [them] to be better on the job,” he says.^[6]

Similarly, eLearning Industry noted that adaptive learning, when supported by strong analytics and measurement of training effectiveness, will take learning to the next level and become increasingly more prevalent.^[7]



At the same time, digital transformation is also altering how organizational leaders view learning and development. Virtually every company is worried about the need to re-skill and continuously develop employees. [8] This has heightened the focus on the use of analytics to improve learning outcomes, on moving applications to the cloud for greater accessibility and flexibility, and on measuring ROI to show the value of software investments.

In response to the multitude of pressures being placed on corporate learning and development teams, new modes of learning have come to market. These include next-generation learning management systems, learning experience platforms, microlearning platforms, and MOOCs. While these various learning systems can deliver some components of a modern corporate learning experience, such as offering “Netflix-like engagement,” increased self-service, or small rapid bursts of learning, they are not fully capable of addressing learning in the flow of work, tracking user engagement, and delivering actionable insights that will improve the learning process and prove ROI. However, this is where a Digital Adoption Solution shines.

58%



of learners want to learn at their own pace.[9]

49%



of learners say they want to learn in the flow of work.

THE VALUE OF A DIGITAL ADOPTION SOLUTION



With a Digital Adoption Solution, your organization can not only achieve greater application competency and faster adoption, you can also realize greater value from your organization’s existing learning and development infrastructure.

Here are the most common reasons a DAS can add value to the onboarding and ongoing training process of enterprise application deployments:





1. VALIDATE SOFTWARE ROI

Human capital and your enterprise software applications are two of your organization's biggest investments. Ensuring that both are more productive and efficient will deliver a higher ROI on each. How can you do this? By using a DAS to measure impact of training, new skill acquisition, and other KPIs.



2. ALLOW FOR DATA-DRIVEN DECISION MAKING

Data drives better decision making, which in turn can increase the effectiveness of your learning and development efforts and the productivity and competency of your employees. Therefore, you need data that will allow you to see:

- Where employees have been in an application
- How long an employee has been there
- Where they went afterwards
- What tasks they accomplished



3. GAIN AN UNDERSTANDING OF THE EFFECTIVENESS OF YOUR LEARNING AND TRAINING EFFORTS

To understand the effectiveness of your training efforts, you need the ability to assess if someone has correctly completed the workflow you are trying to teach. A DAS allows you to gather data, such as how long it takes users to complete certain tasks, how long they spend resolving an issue, and what learning materials they accessed to help in resolving the issue. Using this data, you can assess the entire learning continuum, starting with classroom training, moving to your LMS, and going all the way to the point of work.





4. IMPROVE EXISTING LEARNING AND DEVELOPMENT EFFORTS

A DAS can gather data that enables you to not only understand the effectiveness of your training, but to improve upon it. With the ability to collect data on the end user's experience at the point of work and export this data back to a robust LMS, you can increase your understanding of your learning development efforts and your employees' skills.



5. STREAMLINE CREATION OF LEARNING AND DEVELOPMENT CONTENT

A DAS can also assist with reducing the time and effort involved with the creation of job aids and contextual guidance materials that support end user learning. This can be done through collaborative authoring of content. Subject matter experts within the organization can contribute to the creation of learning materials through the platform while a Learning and Development professional manages the entire process from start to finish, retaining control of editing, publishing, and distribution to end



6. OTHER BENEFITS

Some DAS's can provide additional benefits useful in a digital transformation initiative. Depending on the type of DAS, some are able to leverage the authoring process to generate other forms of output such as User Acceptance Test scripts, compliance documentation, Section 508 compliant output, SOP documentation and manuals. These types of DAS have a capability know as single source/multiple output, which facilitates the generation and maintenance of these outputs.





MORE COMPLEXITY, BUT LESS TIME TO LEARN



Do you have the tools to keep up?

The average employee only has 24 minutes a week to learn.^[10] Under such significant time constraints, learning must be streamlined and highly effective. If employees have to stop what they are doing to seek help, it disrupts not only their own productivity, but productivity across the organization as others must also stop their work to help.

Finding a tool that can reduce learning inefficiencies is a critical component of achieving digital adoption and competency within an application. However, most corporate learning and development workflow processes still leave individuals struggling to get the help they need, at the moment they need it, with materials that are personalized to best aid individual learning. Additionally, most solutions can't provide real insights into why or where individuals need help. Finally, because of the time-consuming nature of creating job aids and contextual guidance materials to assist with learning in the flow of work, there may not be the resources to create the necessary materials.

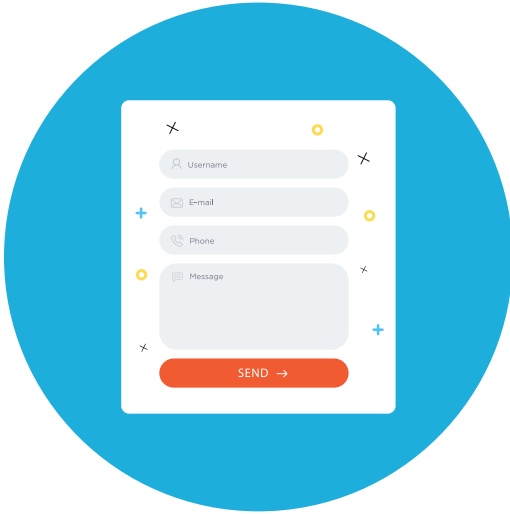


The Right Capabilities for the Right Results

Not all DAS's are created equal. That's why, when it comes to selecting the right DAS for your business goals, there are a number of factors to consider to determine which solution will help your organization achieve the most cost-savings and time-savings associated with developing learning content while also achieving the desired outcomes of meeting ROI expectations and achieving a high level of user competency and digital adoption within an application.



BELOW IS A LIST OF THE MOST IMPORTANT CONSIDERATIONS WHEN SELECTING A PAP AND WHY THEY MATTER:



1. Field mapping

In an application, a “field” is anything on the screen a user can interact with. For example, in a simple contact form, there is usually a name field, an email field, a message field, and a submit button. In a more complex application like an ERP, you could have many more fields, like facility location, purchase order number, tax locality, account ID, budget code, toggle buttons, multi-selects, dropdowns, or hundreds of other options depending on your ERP module. To record a task or workflow, each field needs to be captured and mapped, in sequence, along with any corresponding field labels, controls, actions, and images. If a process has 15 steps, and each step involves only one field, you will need to sequentially map 15 fields to fully capture the process. If each step has two fields, you would need to map 30 fields, and so on. If this mapping is being done manually, it requires the person creating the materials to save and commit each field for each step.

For a short process or only a handful of processes that need to be mapped, manual field mapping works fine. However, if you have hundreds of fields to map for one process or hundreds of processes, manually mapping fields becomes too time-consuming. Some DAS's can automate the capture and recording of each field in a process, providing significant time-saving advantages.



QUESTIONS TO ASK:

- 1 What types of tasks do I need to create learning materials for?
- 2 How many steps are involved in each process?
- 3 Does this DAS offer an automated way to capture and record every field in a process?





2. Capture fidelity and ability

Capture fidelity refers to how good the DAS is at object recognition and how many fields it can capture correctly. Many DAS's have roughly the same capture fidelity, but not all DAS's can capture fields from all applications. For example, some can only capture fields in web-based applications, but are not able to be used with desktop-based applications. Additionally, some PAPs have the ability to capture individual workflows and processes that span multiple applications, and can even move between desktop and web-based applications.



QUESTIONS TO ASK:

- 1 What applications does the DAS capture with high fidelity? Low fidelity?
- 2 Can it record workflows and processes that span multiple applications?
- 3 How many steps will need to be edited and what is the productivity impact?





3. Editor capabilities

Because capture fidelity is not perfect in any DAS, some editing is always part of the content creation process. Editor capabilities can vary in different DAS's, so it's important to understand what capabilities are available. For ease of editing, look for features such as drag-and-drop editing, code-free editing, and the promise that non-technical users can edit with ease.

Another important editing feature is whether you can re-edit already published content. Not all DAS editors allow you to do so. If they don't, and a process you have already recorded has changed, you will have to rebuild the entire process. Another big time-saving feature of some DAS editors is "single-source editing," where you can edit source material once and have the changes applied across all output types automatically.

Because editing capabilities are such a critical factor of how well the DAS will work for your organization, we recommend you demo this feature before you buy to make sure it is user-friendly for your team.



QUESTIONS TO ASK:

- 1 How much time can I save with this editor over other DAS's?
- 2 If I have to go back and re-edit a piece of content, can I do so or do I need to rebuild the content?
- 3 If I can re-edit, do I have to make the change for every type of output, or can I change it in a single source and deploy it to all output types automatically?





4. Collaborative authoring

Some DAS's allow subject matter experts (SMEs) to author content in collaboration with DAS admins. Many documentation and user adoption efforts fail early on, because the volume of content needed outstrips the capacity for Learning and Development and project teams to create it. Enabling SMEs to create content helps dramatically increase overall capacity. It can also result in better outcomes because these experts can provide process and learning insights that even a trainer or facilitator may not know. Ideally, the collaborative authoring capability would allow the DAS admin to retain final editing, publishing, and distribution control.



QUESTIONS TO ASK:

- 1 Can I create roles and permissions within the DAS?
- 2 It's challenging to get SME's to generate the documentation needed, how much training does the DAS require for SME involvement and compliance?
- 3 Is the editing tool capable of engaging multiple individuals to create a single piece of content? If not, are you at least able to create content and then send to a SME for review all within the tool?





5. Employee engagement and UX considerations

It's important that the tool you select is user-friendly and will increase employee engagement. After all, a DAS is another application that also requires user adoption. Studies show that when users have an "effortless experience," it has a greater impact on performance than any other strategy for introducing digital technologies. In fact, the research shows that HR can boost employee performance by up to 15 percent with digital processes that are effortless.[11]



QUESTIONS TO ASK:

- 1 Is the DAS end-user interface easy to use and to navigate?
- 2 Do you feel confident people will use it?
- 3 Does it provide the ability to customize outputs to match corporate brand standards?





6. Analytics

In order to truly be able to understand the effectiveness of your learning content and the performance of your employees, you need analytics. Not all DAS's allow you to track end user behavior within the platform, so be sure to ask about the analytical capabilities of the solution.



QUESTIONS TO ASK:

- 1 Does the DAS have any analytics capabilities?
- 2 What types of data can it track, and what types of insights can you glean from this data?
- 3 Can the data be exported to your LMS or other L&D infrastructure?





7. Compatibility with other learning and development infrastructure

Having the ability to integrate with other learning and development infrastructure will give you more data and analytical capabilities, resulting in more insights and better outcomes.



QUESTIONS TO ASK:

- 1 Is it compatible with SCORM?
- 2 Is it compatible with xAPI?
- 3 Can you export data from the DAS to your LMS or other learning and development infrastructure?





8. Cloud vs. on-premise

DAS's can be deployed as either a cloud solution or on-premise. While each has advantages and disadvantages, a cloud-based DAS will reduce upfront costs, provide greater scalability, and allow you to future-proof your investment. The biggest advantage of an on-premise solution is typically having more control.



QUESTIONS TO ASK:

- 1 Is the DAS cloud-based or on-premise? Is it SaaS?
- 2 If the solution is on-premise, what are the CapEx vs. OpEx costs?
- 3 Are you looking for a scalable, future-proofed solution?





9. Customer success and customer support

It's not a question of whether you will need support or not – you will. So, it's important to understand what the DAS vendor's commitment is to offering support and how those services will impact your experience with the DAS.



QUESTIONS TO ASK:

- 1 Is there a customer success and support commitment included in your contract?
- 2 What is the cost of this support?
- 3 What are the terms of support?





10. Project management

Having the ability to manage the entire digital adoption content creation process from end-to-end within one tool can help you ensure that projects remain on-time. It can also provide visibility into your resource capacity, showing you who is working on what, so you know whether they can take on additional work, or if they are overburdened.



QUESTIONS TO ASK:

- 1 Does the DAS provide the ability to assign roles and permissions?
- 2 Can multiple individuals create, edit, and collaborate on a single piece of content?
- 3 Does the DAS provide team, project, task, and content management workflow to manage digital adoption efforts across your application landscape and over time?





DIGITAL ADOPTION SOLUTION BUYER CHEAT SHEET

As you work your way through the evaluation process, we've created a handy evaluation form where you can rank each consideration based on its importance to your organization and make notes of about specific vendors capabilities.

CONSIDERATION	RATING (1-10)	QUESTIONS TO ASK	NOTES
FIELD MAPPING		<ol style="list-style-type: none"> 1. WHAT TYPES OF TASKS DO I NEED TO CREATE LEARNING MATERIALS FOR? 2. HOW MANY STEPS ARE INVOLVED IN EACH PROCESS? 3. DOES THIS DAS OFFER AN AUTOMATED WAY TO CAPTURE AND RECORD EVERY FIELD IN A PROCESS? 	
CAPTURE FIDELITY AND ABILITY		<ol style="list-style-type: none"> 1. WHAT APPLICATIONS DOES THE DAS CAPTURE WITH HIGH FIDELITY? LOW FIDELITY? 2. CAN IT RECORD WORKFLOWS AND PROCESSES THAT SPAN MULTIPLE APPLICATIONS? 3. HOW MANY STEPS WILL NEED TO BE EDITED AND WHAT IS THE PRODUCTIVITY IMPACT? 	
EDITOR CAPABILITIES		<ol style="list-style-type: none"> 1. HOW MUCH TIME CAN I SAVE WITH THIS EDITOR OVER OTHER DAS'S? 2. IF I HAVE TO GO BACK AND RE-EDIT A PIECE OF CONTENT, CAN I DO SO OR DO I NEED TO REBUILD THE CONTENT? 3. IF I CAN RE-EDIT, DO I HAVE TO MAKE THE CHANGE FOR EVERY TYPE OF OUTPUT, OR CAN I CHANGE IT IN A SINGLE SOURCE AND DEPLOY IT TO ALL OUTPUT TYPES AUTOMATICALLY? 	
COLLABORATIVE AUTHORIZING		<ol style="list-style-type: none"> 1. CAN I CREATE ROLES AND PERMISSIONS WITHIN THE DAS? 2. HOW MUCH TRAINING DOES THE DAS REQUIRE FOR SME INVOLVEMENT AND COMPLIANCE? 3. IS THE EDITING TOOL CAPABLE OF ENGAGING MULTIPLE INDIVIDUALS TO CREATE A SINGLE PIECE OF CONTENT? IF NOT, ARE YOU AT LEAST ABLE TO CREATE CONTENT AND THEN SEND TO A SME FOR REVIEW ALL WITHIN THE TOOL? 	



CONSIDERATION	RATING (1-10)	QUESTIONS TO ASK	NOTES
EMPLOYEE ENGAGEMENT/UX		<ol style="list-style-type: none"> 1. IS THE DAS END-USER INTERFACE EASY TO USE AND TO NAVIGATE? 2. DO YOU FEEL CONFIDENT PEOPLE WILL USE IT? 3. DOES IT PROVIDE THE ABILITY CUSTOMIZE OUTPUTS TO MATCH CORPORATE BRAND STANDARDS? 	
ANALYTICS		<ol style="list-style-type: none"> 1. DOES THE DAS HAVE ANY ANALYTICS CAPABILITIES? 2. WHAT TYPES OF DATA CAN IT TRACK, AND WHAT TYPES OF INSIGHTS CAN YOU GLEAN FROM THIS DATA? 3. CAN THE DATA BE EXPORTED TO YOUR LMS OR OTHER L&D INFRASTRUCTURE? 	
COMPATIBILITY WITH OTHER L&D INFRASTRUCTURE		<ol style="list-style-type: none"> 1. IS IT COMPATIBLE WITH SCORM? 2. IS IT COMPATIBLE WITH XAPI? 3. CAN YOU EXPORT DATA FROM THE DAS TO YOUR LMS OR OTHER LEARNING AND DEVELOPMENT INFRASTRUCTURE? 	
CLOUD APPLICATION		<ol style="list-style-type: none"> 1. IS THE DAS CLOUD-BASED OR ON-PREMISE? IS IT SAAS? 2. IF THE DAS IS ON-PREMISE, WHAT ARE THE CAPEX VS. OPEX COSTS? 3. ARE YOU LOOKING FOR A SCALABLE, FUTURE-PROOFED SOLUTION? 	
CUSTOMER SUCCESS AND SUPPORT		<ol style="list-style-type: none"> 1. IS THERE A CUSTOMER SUCCESS AND SUPPORT COMMITMENT INCLUDED IN YOUR CONTRACT? 2. WHAT IS THE COST OF THIS SUPPORT? 3. WHAT ARE THE TERMS OF SUPPORT? 	
PROJECT MANAGEMENT		<ol style="list-style-type: none"> 1. DOES THE DAS PROVIDE THE ABILITY TO ASSIGN ROLES AND PERMISSIONS? 2. CAN MULTIPLE INDIVIDUALS CREATE, EDIT, AND COLLABORATE ON A SINGLE PIECE OF CONTENT? 3. DOES THE DAS PROVIDE TEAM, PROJECT, TASK, AND CONTENT MANAGEMENT WORKFLOW TO MANAGE DIGITAL ADOPTION EFFORTS ACROSS YOUR APPLICATION LANDSCAPE AND OVER TIME? 	





ABOUT EPILOGUE

Epilogue Systems is the creator of Opus, a Digital Adoption Solution (DAS) made for the complex application environments of medium to large entities. Opus enables those with the knowledge, Subject Matter Experts, to nearly effortlessly capture application processes and tasks know-how which is delivered to application users as they are in their applications and at their moment of need. With one click, users are provided user-relevant and task-relevant guidance to complete their tasks accurately and timely. Opus is enabling organizations to work smarter, accelerate productivity and drive the intended outcomes from your critical applications. Epilogue Systems' software is used by some of the world's most innovative enterprises, including members of the Fortune 500.

epiloguesystems.com/demo

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