

# WALKTHROUGHS

Interactive guides for end users



VisualSP®

A WHITE PAPER





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# Introduction to Contextual Guidance

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## USER LEARNING AND EFFECTIVE COMMUNICATION IN THE WORKSPACE

Tens of thousands of organizations that have invested in training infrastructure but most continue to face a common roadblock: how to effectively and efficiently onboard employees enabling to use the solution to help with their jobs but doing it with minimum friction. Adopting any SaaS technology can disrupt operations significantly, and delays in getting employees to master new platforms and that can be costly in both losses of productivity and operational expenses.

Estimates put the cost of a lost new employee between 50% and 150% of the departing employee's annual salary

The sacrifice can be especially wasteful when bringing on new employees. New hires that experience a poor onboarding process carries the risk of leaving shortly after being hired. According to PricewaterhouseCoopers, nearly one in three newly hired employees leave the company—voluntarily or involuntarily—before the end of their first year. The number of employees leaving before the first year is completed has been steadily climbing, creating a huge financial loss for companies.

The agony of weak user onboarding has led to many enterprises struggling to get satisfactory productivity levels from it. One AIIM (the Association for Information and Image Management) report found up to 40% of organizations say their onboarding implementation was not a total success. Of those organizations, 67% cite inadequate user training as the primary reason.

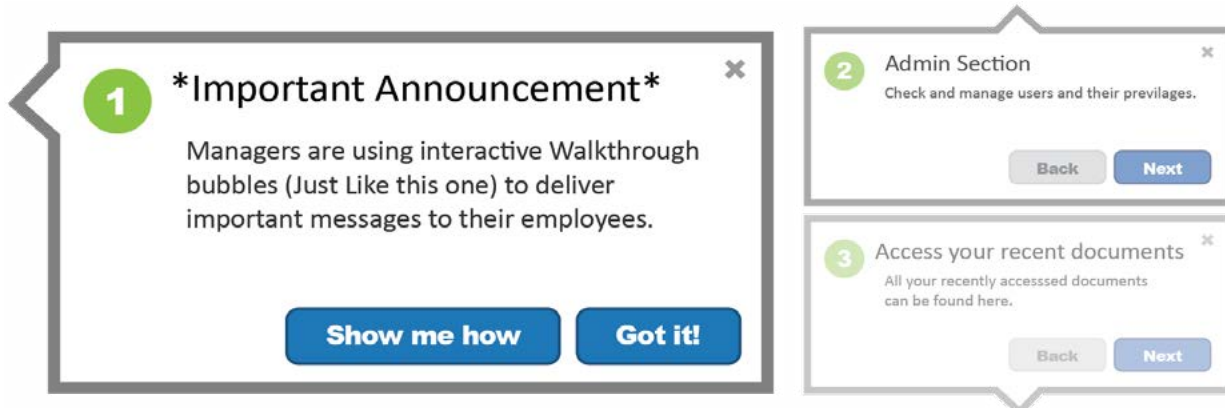
AIIM found that only 6% of organizations feel “they have achieved success with their onboarding process”, while 26% say they have “struggled to meet expectations”, and 28% report that while it’s doing the job, “progress has stalled to some extent”, 7% reported their onboarding implementations were just “not successful”

Learners can forget up to 70% of the content they are taught within 24-48 hours of formal training

Memory retention can be a big obstacle when it comes to onboarding. Learners can forget up to 70% of the content they are taught within 24-48 hours of formal training. It’s not surprising to note that many recent studies report that our attention spans have dwindled. These two issues have likely contributed to lackluster or unsuccessful user onboarding.

# The Walkthrough Solution

An interactive walkthrough, or guided tour, is a “micro-learning” tutorial that appears as an overlay to any workflow, giving users a step-by-step flow (or single step) introducing features and capabilities. They are typically delivered in 2-3 step sequences but can grow to ten times that number if describing a more complex or complicated workflow. In some cases, the walkthrough can explain how to complete tasks; in other cases, it can simply provide just some helpful tips and tricks.

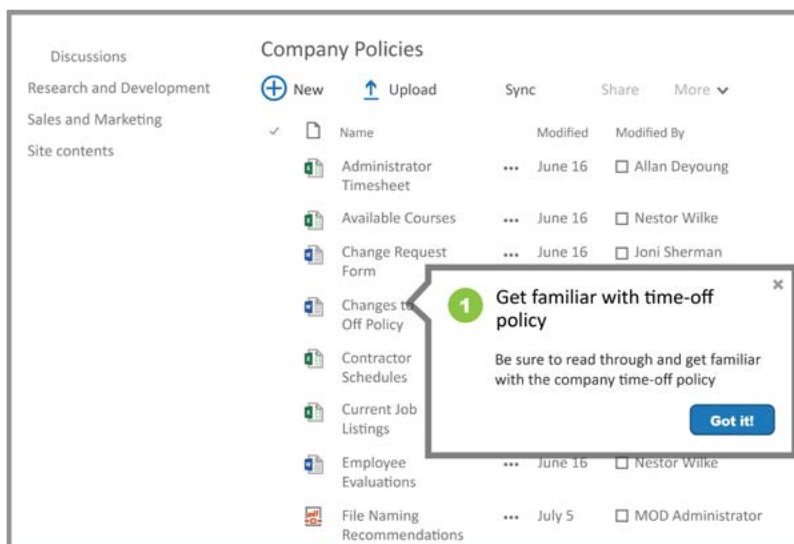


Walkthroughs are made up of “bubbles” that usually contain instructions and navigation buttons. Bubbles appear on the screen at various locations, pointing out key spots in the application environment. Users have the option to continue through multi-part walkthroughs or end them at any point.

User walkthroughs have been successful in addressing several business challenges including:

- ▶ Technology adoption
- ▶ Corporate governance
- ▶ Regulatory compliance
- ▶ Internal communications
- ▶ Reduction in support calls

A walkthrough is particularly useful when users need step-by-step guidance through a workflow or business process. Users engage with each step, which helps to maximize learning retention, so they learn to use faster. As the saying goes, practice makes perfect.



Walkthroughs help users in various real-world settings. For instance, as organizations modify application to fit their business needs, team leaders can deploy walkthroughs to show users how to work within the customized environment. In cases, where management is having difficulty getting users to search for assistance with their new environment, a walkthrough opens at key points without the need to search for anything, leading users through learning paths.

A walkthrough solution helps to get the most from platform investments by creating a better onboarding experience through a simplified training/learning model. Walkthroughs reduce friction for new users by creating simple engagements that capture shorter attention spans. As a result, enterprises can improve workflows and increase user engagement with the platform.

## THE “AHA!” MOMENT

Walkthroughs help to provide what is known as the “Aha!” moment—the instant a user absorbs the information they need to perform a task and see the results of their action. Walkthroughs keep users focused through a single step or multiple steps of a process or workflow.

When the “Aha!” moment arrives at a moment of need, a walkthroughs subject matter is more likely to be absorbed. A moment of need occurs in real time—for example when a user attempts to check out a document in custom platform for the first time.



Workers often experience multiple points of need throughout changes in their careers—especially when it comes to new technology. In order to enable successful learning, end users must be engaged at the moment of need. They will be more engaged if they are able to learn how to do their jobs in real time via these easy to follow bite-size learning experiences.

## BENEFITS TO PROVIDING WALKTHROUGHS

Once enterprises discover how walkthroughs improve the user learning experience, they’re better able to reap the benefits. Key performance indicators for learning that have been improved include:

- ▶ Reduced time-to-competency
- ▶ Increased productivity
- ▶ Reduced errors

For users, reduced friction leads to more positive work experience, because they're able to complete their tasks easily. Among the tangible emotional benefits they may experience are:

Reduced friction leads to a more positive work experience

- ▶ Reduced frustration
- ▶ Improved confidence
- ▶ Increased ability to deal effectively with task-related challenges

When onboarding is successful and efficient, enterprises benefit in several ways, not the least of which is an improved return on investment. When organizations can manage content, workflows, internal communications, and so on, they become more optimized and generally perform better.

Walkthroughs can be effective at:

- ▶ Improving adoption
- ▶ Strengthening governance
- ▶ Reducing user training and support costs
- ▶ Improving policy communications
- ▶ Reducing the burden on IT or peers for guidance
- ▶ Providing user-driven learning

# Walkthroughs Outcome

## IMPROVE ADOPTION

For most organizations, getting users to adopt their platform fairly critical since those financial investments can be significant. For information workers, the training experience is critical to strong adoption and faster time to return value from the effort.

From the workers' perspective, the goal when they are learning a new system is typically to get the job done. They are more likely to adopt when they see the value,

in the form of making work tasks easy to learn. If users can master their tasks with minimal disruption, effort, and friction, adoption will often improve, as well as employee morale.

User onboarding is a critical time for enterprise adoption. It's a period where users need to feel at home with a new platform or application, or even a new job or role. Walkthroughs support that needs with an easy-to-follow, engaging delivery.

## **STRENGTHEN GOVERNANCE**

Ensuring that knowledge workers using the platform are in compliance and following internal governance policies is a communications challenge. Walkthroughs can be used to make sure employees understand the company-issued methods to complete a task without having them disrupt their work to read an email or attend a training session.

For enterprises in heavily regulated industries, compliance is a huge concern. A custom platform can help support company governance, but only if users understand how to complete their tasks appropriately to maintain compliance. Walkthroughs can provide the right level of guidance to manage governance without being overwhelming and requiring too much reading of dull regulations and materials.

## **REDUCE TRAINING AND USER SUPPORT COSTS**

Cash-strapped companies or enterprises with lean IT support teams face the pressure of training employees with limited resources. In some cases, they may leave it up to users to teach themselves - through web searches for text or video materials and/or third-party training sites. Those options require disrupting their workflow, leading to friction and disappointment. They may not even be training themselves on the right answers!

Walkthroughs provided in the work context reduces the burden of training and IT support. There is no need for dedicated online or classroom training, which can lead to retention loss following only a few days after completion. Users can access a walkthrough at any time without leaving their work screen, allowing the guidance provided to “sink in” faster and more sustainably.



## IMPROVE POLICY COMMUNICATION

Walkthroughs make a strong communications tool when used to distribute policies governing work processes or key business rules. Management can provide a step-by-step policy walkthrough right where users will be working, which helps workers retain the information. Organizations operating in highly regulated industries can use walkthroughs to distribute policy guidelines in the workflow, specifically to those whose jobs fall within a regulatory or legal review.

## REDUCE BURDEN ON IT OR PEERS

Onboarding tools such as walkthroughs not only reduce training and support expenses but also shorten the distance between confusion and adoption. [A user walkthrough provides a focused delivery that guides users through features and capabilities, which has been shown to reduce the number of “how to” calls or tickets to IT support by 25%-70%.](#)

Many times, new users look to peers or managers to get support. Doing so reduces not only the new user’s productivity but also the peer or manager being disrupted. Walkthroughs reduce the need to call on others for the simple “how to” questions. Providing this type of support improves productivity and leads to a more satisfied workforce.

## PROVIDE USER-DRIVEN LEARNING

Recent research shows that younger workers prefer to manage their own learning processes. Today’s digital-savvy technology users understand that SaaS providers are giving them greater and greater command of their own experiences with applications and platforms. User-driven learning delivers the right amount of guidance at specific times during “need state”, such as when someone is learning an app for the first time, or when a migration or update takes place that requires training updates.

Walkthroughs offer a simple yet effective method to provide self-paced learning in any environment. This helps improve training from onboarding through a version release’s lifecycle. As a result, walkthroughs help provide higher user engagement, because they manage their own learning experience. (Remember, users are more

likely to adopt when they can get satisfaction during a moment of need - the “Aha!” moment.)

## WALKTHROUGHS PROVIDE “REAL LEARNING”

Guidance can be provided for every web part, so walkthroughs can appear wherever they are needed. Contextual guidance has been shown to improve user comprehension because of its capacity to engage users as they work, where they are working. Microsoft MVP and conference speaker Susan Hanley put it this way: “Real learning takes place when you’ve got information available just when you’re about to do a task – in context. Most people forget what they learn in training classes. It’s when users are invested in a task that they’ll really absorb and retain it. Real learning takes place when you’ve got information available just when you’re about to do a task – in context. “

When memory retention becomes a big roadblock to deep platform adoption, organizations often miss a crucial opportunity to strengthen adoption by providing in-context support during a new system implementation. Deeper adoption can be achieved if end-user skills are developed in the moment of need.

A report titled Building Staff Engagement revealed that learning innovation through tools such as a walkthrough results in a 23% improvement in the speed of a new system rollout and a 12% reduction in time to proven competency.

A walkthrough can enable your employees to immediately operate on platform without any prior knowledge. Make sure your employees follow your processes, avoid operating errors, and stay in compliance with your very own walkthroughs with the

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**Susan Hanley**

MVP | Conference speaker

VisualSP Help System.

You can help create a tangible onboarding experience, maintain a strong adoption level for all users, and improve your user retention by letting confused users engage and re-engage with helpful guidance through walkthroughs.

## GET STARTED TODAY

Please visit the VisualSP product section of our website and experience Walkthroughs for yourself.

- ▶ Review numerous demonstrations of sample walkthroughs
- ▶ Take a step by step guide how internal site administrations can create their own custom walkthrough content
- ▶ Discover the other features of the VisualSP help system including 100's of short easily-consumed video tutorials, annotated detailed screenshots and tip sheets

There are many other companies developing walkthroughs for literally hundreds of software applications, what makes us special from other walkthrough and help systems is that our content is produced and curated by experts, certified trainers, and authors in the industry. These experts have trained and consulted with thousands of end users, including non-technical administrators. Our content authors understand the value of in-context training to support onboarding and understand the best ways to describe that material.

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