



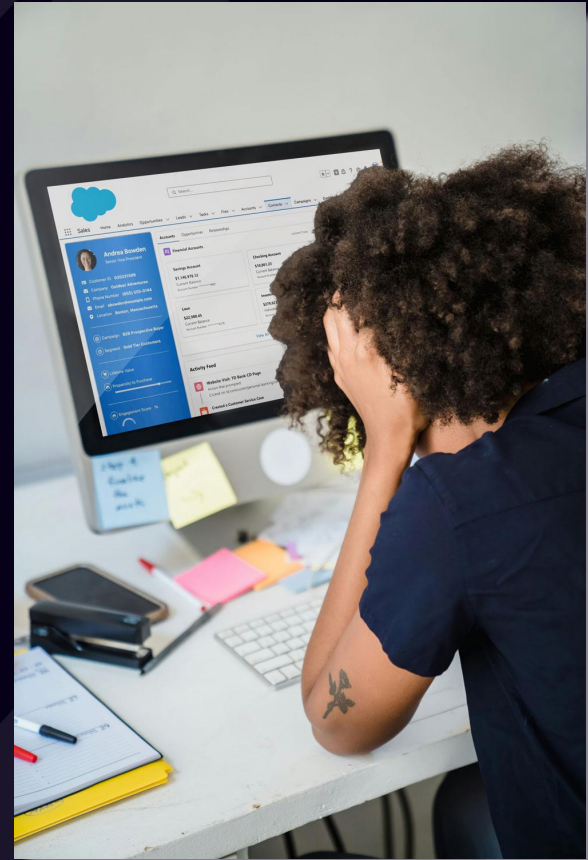
PENDO 
MONIUM
2024

PENDOMONIUM 2024

Taking digital adoption to the next level



This is Julie...



PENDOMONIUM 2024



David Alley

VP of Sales & Channel

MAVERICK
SOLUTIONS



PENDOMONIUM 2024





Paul McClintock

VP of Product & Technology

MAVERICK
SOLUTIONS



PENDOMONIUM 2024

Agenda

- **Who is Maverick?**
- **What we've seen**
- **Where do I start?**
- **Q&A**

What is a digital adoption platform?



Data-driven insights

DAPs make the most of your software and help employees get work done productively



Real-time guidance

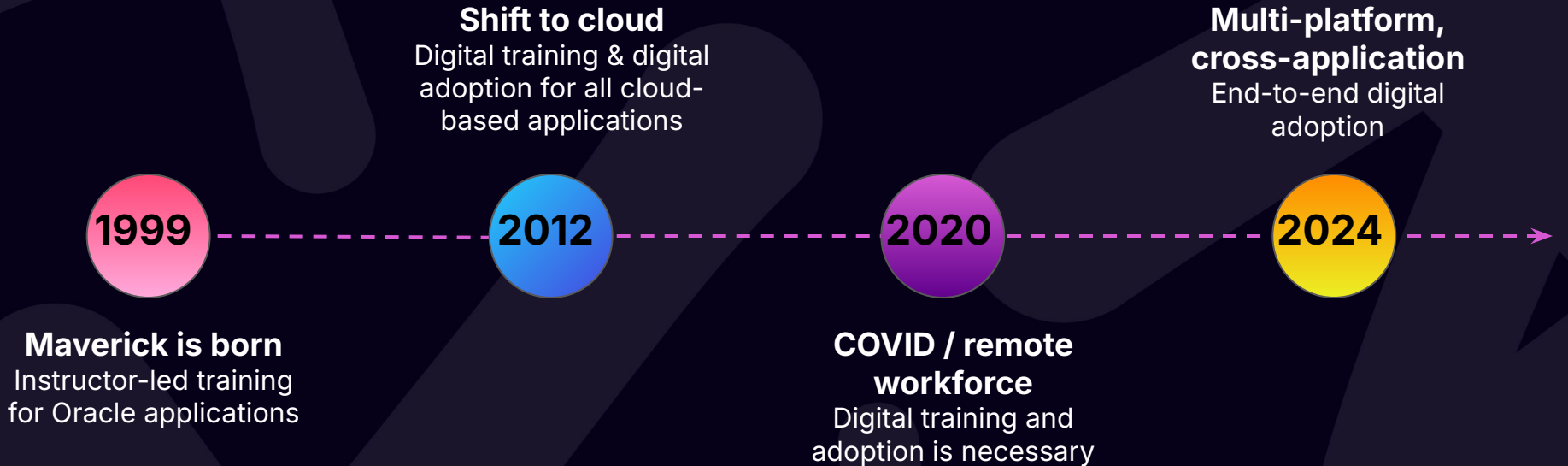
DAPs empower your teams to be successful right inside your applications



Personalization

DAPs tailor your employee experience so they learn and keep learning long term

Maverick Solutions





pendo4.lightning.force.com/lightning/r/Account/001Hp00003cEhscIAC/view

Acme Inc Search...

Wealth Management Accounts Contacts Financial Accounts Assets and Liabilities Financial Goals Financial Holdings Securities Reciprocal Roles Leads and Referrals Cases More

Person Account **Mr. Antonio Gonzales** Follow New Case Open Relationship Center Add Beneficiary to Policy

Total Financial Accounts: \$312,377.65 | Total Investments: \$300,000.00 | Net Worth: \$3,450,000.00 | Customer Timezone: America/Los_Angeles | Next Life Event: Retirement | KYC Status: Required

After pendo

Related Know Your Customer Financial Accounts Goals Relationships ARC Referrals More

Action Plans (0) New Plan

Related Accounts (2) Add Relationship

Adams Consulting L... Roles: Other | Adams Household (... Roles: Spouse

View All

Financial Account Primary Owner (1) New

Financial Account Name	Status	Account Number	Balance
Antonio's Investment Account [Sample]	Open		\$300,000.00

View All

Opportunities (1) New

Wallet Share Opportunity - Antonio Gonzales

Compliance alert! You must complete a **Know Your Customer** application and submit for approval to do business with this client.

Information you will need from your client:

- Personal information (SSN or Tax ID)
- Employment details and W-2 income
- Government ID photo and proof of address or recent pay stub

Learn more about audit preparedness

Activity Chatter

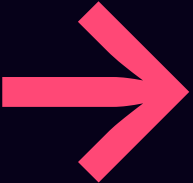
Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

Adjust Portfolio Sep 30

You have an upcoming task with Antonio Gonzales

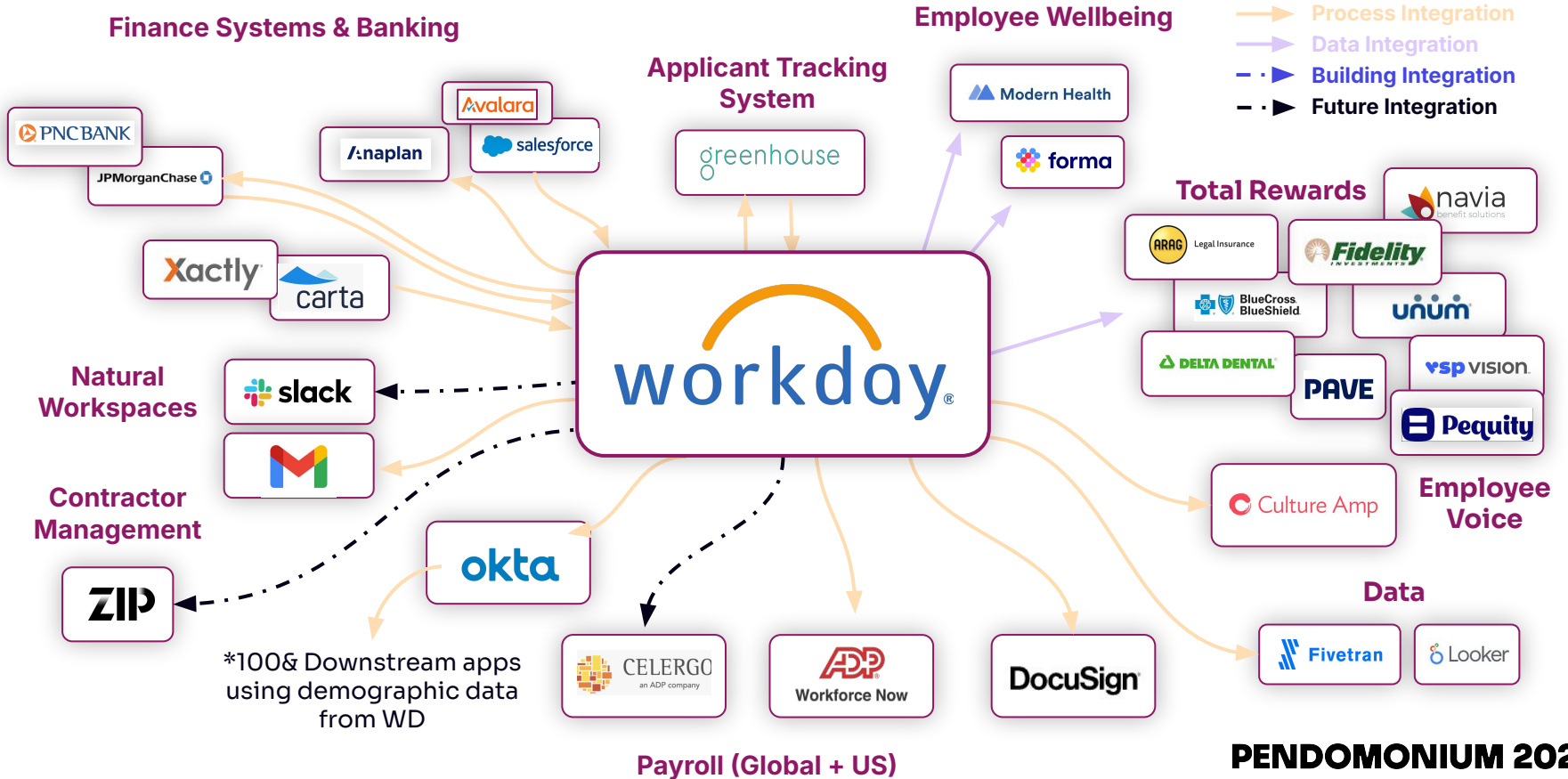




What we've seen...

Yikes!

HR ecosystem



Challenges

Remember Julie?



- Compliance violations
- Declining productivity
- Increase in support tickets
- Loss of efficiency
- Inaccurate data
- Lack of relevant help or training
- Failure to onboard
- Feature or application fatigue
- Resistance to change
- Failure to adopt...

Only **39%** of an employee's day is spent on **core, role-specific tasks**

Common mistakes

How do most organizations tackle these challenges?

...the same way Julie did

- “Just wing it!”
- Train-as-you-go
- “Go ask someone”
- Shadow IT - yikes!
- Ramp up support FTEs
- “Google it!...”
- Company-wide email
- Unused doc repository
- Vanity metrics

What if there was a better way?



Give Julie **what she needs**

- Confidence to do her job
- Proficiency in her role
- In-task guidance right when she needs it
- Focus to complete a task
- Ability to be promoted!

Give leadership **what they need**

- Track compliance, lower risk
- Increase data accuracy and reduce rework
- Correctly measure and report digital adoption over time
- Actually SEE the bottom line ROI of your software!



Where do I start?

How to get to value, fast

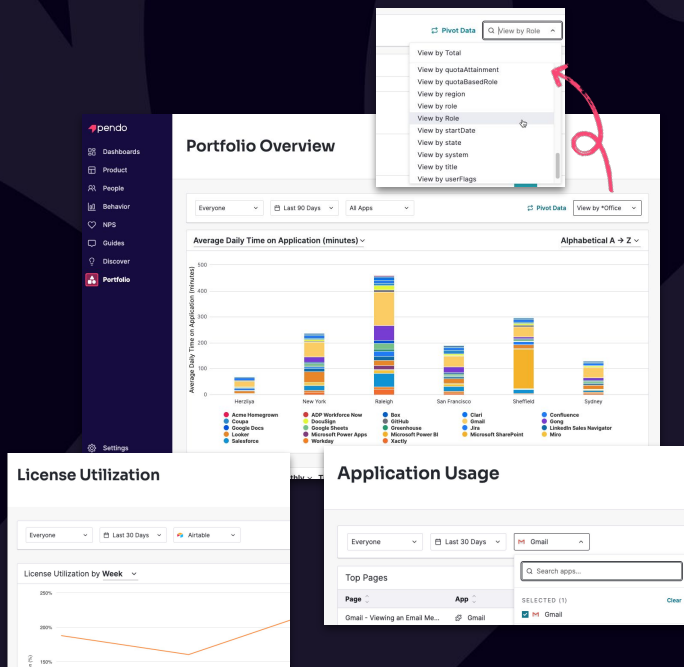


Start small

Do it for Julie!!!

Before you start...

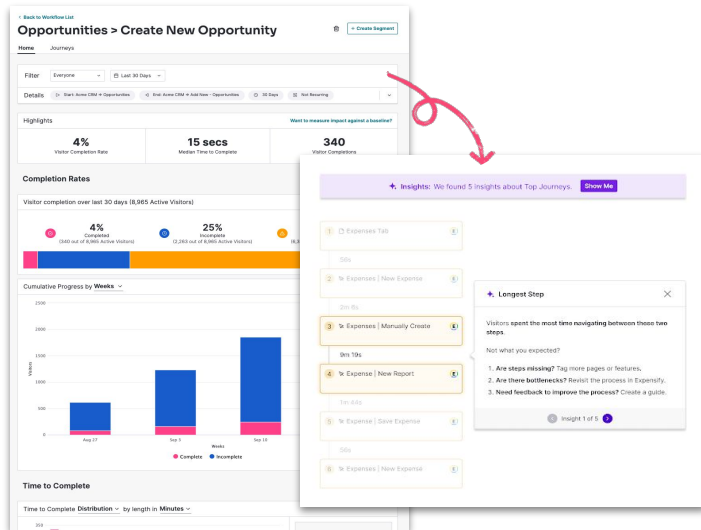
You need to know where you are



- Is a **42% adoption** rate good or bad?
- You started at 7% - a **500% increase**. How about now?
- Find a DAP that can **listen first**

Launch your top 5

Now that you have your baseline, it's time to **see the improvement**

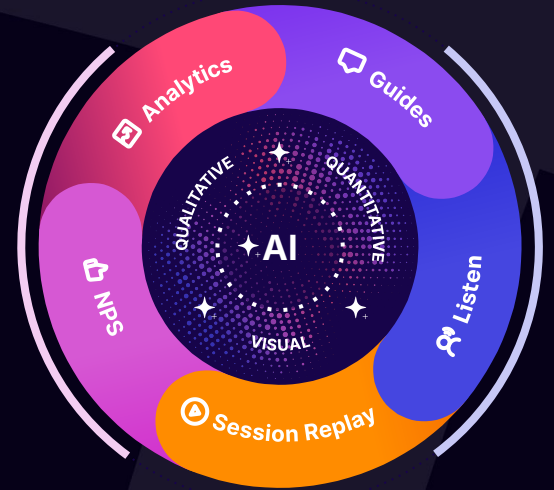


- Analyze support tickets and MDM requests
- Consult with compliance
- Build your top 5 guides
- 3, 2, 1...launch

Launch and listen

What to do after launch

- Continue to listen
- Analyze new data and compare with baseline
- What do you hear?
 - Are there fewer support tickets?
 - Fewer master data rework requests?
 - More process compliance?
 - Are users spending more time in the application?





103

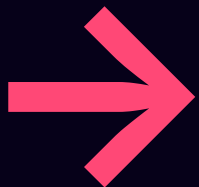
Workflow
steps
removed

70%

Reduction in
support
tickets

82%

Increase in
process
compliance



Results

39%

Increase in
data
accuracy

Enterprise
SaaS ROI in
60 days

3 day
process to
2 hours



Getting buy-in

Influencing up the chain

Hi Julie!

You gave Julie what she needed...



Now let's get leadership onboard

- Where did we start?
- What did we do?
- What did we see?
- How did that make us better?

Your buy-in checklist



1 Baseline listen

- What apps are being used?
- To what capacity?
- Time to complete tasks
- Rework/support requests

2 Launch

- Build top 5 guides
- Launch top 5 guides

3 Listen for results

- Match baseline listen

4 Report up

- Extrapolate the data to the org
- Speak the right language:
 - FTEs / efficiency
 - Reduced top line
 - Impact to bottom line



Questions?



**Connect with
David**

Thank you!

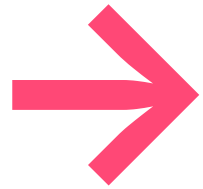


**Connect with
Paul**

PENDOMONIUM 2024



Appendix



Buy-in influence framework

Where did we start?

Department: [Name here]

Application: [Name here]

First we listened:

- [Document apps being used]
- [Document usage capacity - licenses & whole apps]
- [Time to complete tasks]
- [# Rework/support requests]
- [Compliance concerns]

What we learned:

Highlight the **PROBLEMS**

- Current Adoption Rate: **32%**
- **100 support tickets** from single workflow
- **5 unused licenses**
- **1 unused application**
- **5 areas of compliance violations**
- **35 data errors** within a single workflow

What did we change?



**Based off of our learnings,
we created guides for:**

- [List Top 5 guides here]
- ...
- ...
- ...
- ...

**The potential business
impact:**

- [Why were these guides chosen?]
- [Reduce rework]
- [Decrease risk]
- [Increase compliance]
- [Improve efficiency/productivity]
- ...

Results



This is the section where the rubber meets the road.

Quantify **business impacts** seen (i.e FTE reduction, bottom line impact, reduction in support spend, etc):

- **\$12,000/year saved** in unused licenses
- **\$50,000 saved** from contract/compliance violation fines
- **3 Support FTEs** freed up to work other tasks
- Process completed **80% faster** (5 hrs vs 3 days)
- **39% more** backlog prioritization
- Departmental efficiency **increased 5.2x**
- New adoption rate: **71% @ 93% utilization - 121% increase**

Business projections



Here you want to extrapolate the pilot results across all applications, within a department, or across the entire org:

- [What could this look like in full-scale?]
- [How much savings if similar results in every department?]
- [How many support FTEs freed up for backlog prioritization?]
- [How does this compare with the cost to implement?]
- [If we saw this in a single pilot case, imagine the power of DAP across the org... a **437% ROI** on software purchased]