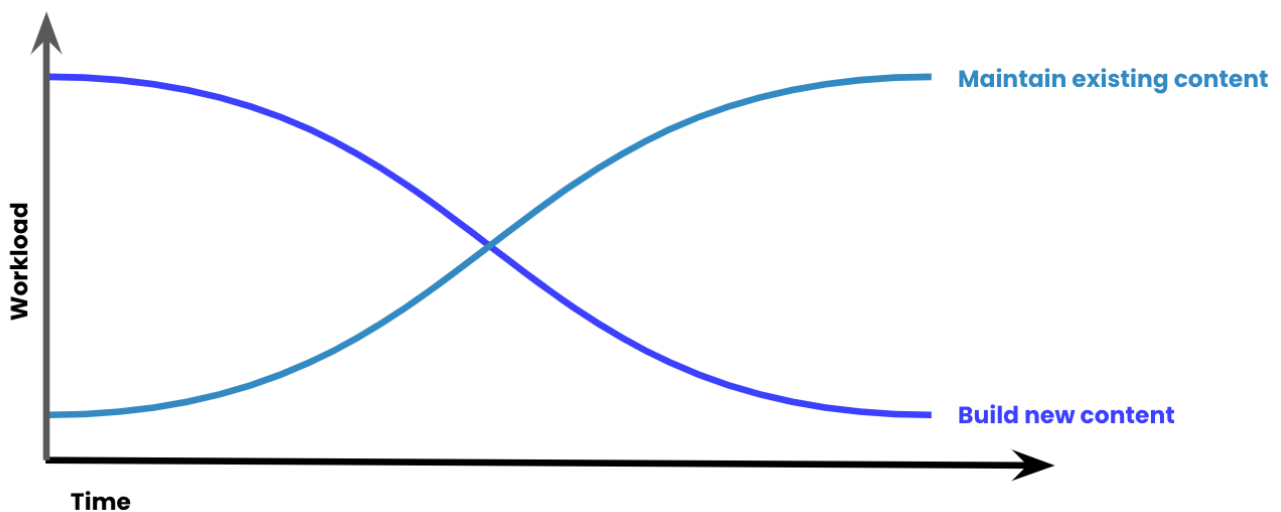


Content Maintenance Strategy

Brief Overview

Content Maintenance is the work needed to ensure all content on the website is relevant, accurate, current, valuable, and up to standard.

- A Content Maintenance strategy reduces risk of users interacting with either outdated or broken content and optimizes the likelihood that they are having an optimal experience with both the application and WalkMe in-application guidance
- For your Center of Excellence resourcing strategy, a balance between content creation and maintenance is recommended



Note

The maintenance process doesn't have to be intimidating! WalkMe has many tools to reduce the effort as you integrate maintenance as a standard process. [Visit the table at the end of this article for more information.](#)

3 Reasons For Maintenance

Content breakage is not the only reason a user might have a non-optimal experience. A thorough Content Maintenance strategy ensures you have processes in place to monitor and optimize **all three of the following**:

1. Content **Function**: Is the content behaving as-expected?
2. Content **Relevance**: Is the business objective this content was originally intended to address, still a priority for the organization?
3. Content **Precision**: Is the chosen solution, the most optimized way of addressing the problem? Is it driving the most impact possible?

Platform Release Cycle Maintenance

Platform release cycle maintenance is the corrective and adaptive process for QA and content maintenance as the platform updates. This primarily addresses the first reason for maintenance: **Content Function**.

Though the publishing of WalkMe content is not required to align with application release cycles, creating a digital adoption content maintenance strategy requires your CoE and/or Project Teams to *be aware of* the development and release cycles of the underlying application.

Salesforce, for example, has three seasonal releases per year. Knowing this information is critical for your Program Manager to adjust Project Lead and Builder resource capacity so they are available for maintenance tasks 2-4 weeks prior to the seasonal release.

Aligning with Your Application Team

1. [Program Manager or Project Lead](#) should identify a System Admin, IS, IT, or Product contact (depending on your WalkMe use-case) and address the following:
 - *What does your development and maintenance cycle currently look like on [platform]?*
 - *How long does it take?*
 - *What teams and roles are involved?*
2. Program Manager or Project Lead should schedule a recurring cadence (e.g. 1x/quarterly) with 1-2 of these contacts depending on the typical development, maintenance and release cycle. A sample agenda for this meeting could be as-follows:
 - System Admin reviews areas in the application with expected changes
 - Digital Adoption Project Lead comes prepared understanding scope of WalkMe in the application and assess level of possible impact
 - Digital Adoption Project Lead scopes maintenance requirement and works with Program Manager to assign Builder resources to the maintenance tasks

Note

In forging this relationship, the CoE team should always start by asking the stakeholders what their level of familiarity is with WalkMe and be prepared to give a short demonstration of the tool in action. See the [WalkMe Champion Toolkit](#) for helpful resources.

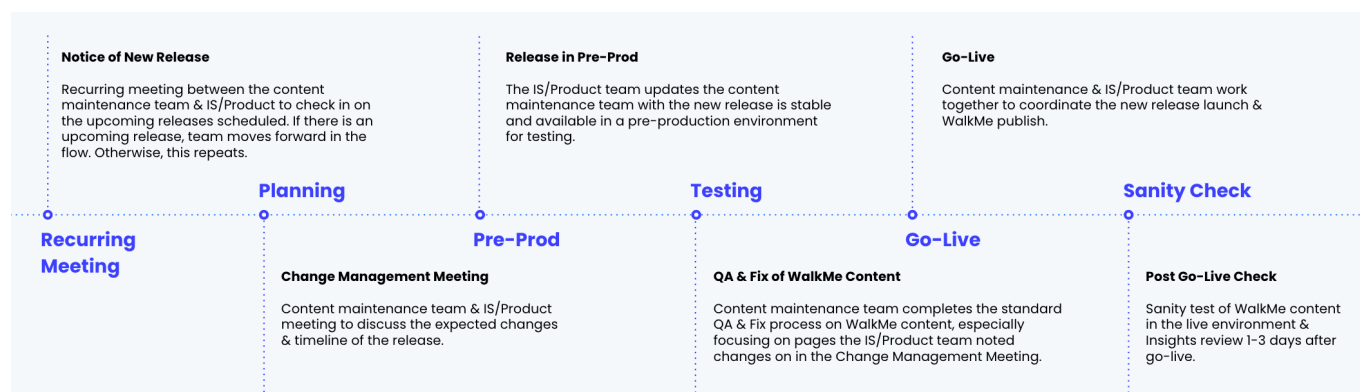
The CoE and Application team should also align on what level of WalkMe education and documentation the Application team needs to feel informed and comfortable.

Some application teams may require a more high-level overview of how WalkMe works + a list of which pages it's on, others may want to take a deeper dive. If any security questions arise, the CoE should assert authority in reassuring the Application team that due diligence has been completed with security and architecture reviews. If needed, the CoE may share WalkMe [Security and Compliance or Architecture documentation found here](#).

Development and Maintenance Flow

Below is a typical development and maintenance flow.

Once you understand the timeline and scope of changes, deploying them to a test environment where your builders can develop the content will mitigate the amount of QA work that needs to be done. Since it's important this information is cyclical, notifying your dev and product teams of the updates you made will mitigate content issues in the future.



Health Scan

A Health Scan is a point-in-time comprehensive review and assessment of your DAP solutions on a single system. This assessment includes a review and analysis of a few categories, including how *impactful* your solution currently is.

The value section of the Health Scan addresses the other two reasons for maintenance: ***Content Relevance and Content Precision.***

Tip

Never done a Health Scan before? WalkMe's Professional Services team can help by conducting your first one and educating your CoE on best practices. Reach out to your Customer Success contact for more information.

Get Started

Maintenance Checklist for Success

Establish relationship and align with IT/IS/Product

Provide the team with documentation on what content is live on your platform using Insights Deployables report

Know about upcoming changes/releases & how it impacts WalkMe

Understand scope of changes and timeline

Know how this influences your WalkMe development cycle (i.e. what new content do you need to build? What existing content do you need to adjust? What goes into the backlog?)

Leveraging WalkMe Resources

Use the [Activity Board](#) and [Insights Reports](#) following platform releases to identify issues (see tools in next section)

Make the relevant fixes

Testing/QA

Sanity check content

Post go live troubleshooting process

Use a ticketing or tracking system for end users to report issues

□ Have an agreed-upon prioritization framework for severity of breakage (for example, P0-P3 system)

- More impactful: Content breaking mid-flow, Menu not appearing, etc.
- Less impactful: SmartTip not appearing

Important Tools & Resources

Reduce the level of effort needed with the following maintenance and optimization tools within the WalkMe Product:

	How to Use/Value of Tool	How to Access	Supporting Links
WalkMe Shield	<ul style="list-style-type: none"> • Streamlined testing • Automate manual testing efforts 	<ul style="list-style-type: none"> • Feature can be enabled by CSM or WalkMe contact upon request • See supporting links for supported systems and known limitations 	WalkMe Shield
Insights Reports: Deployable Report	<ul style="list-style-type: none"> • Share this with your IS/Product teams to ensure they're in alignment with what changes may impact your content • Shows the deployable type & status of the item 	<ul style="list-style-type: none"> • Insights (US) • Insights (EU) 	<ul style="list-style-type: none"> • Learn more about this and other reports that are available to you • Use to plug into the Maintenance Calculator
Maintenance Calculator	<ul style="list-style-type: none"> • Paste the Deployable Report and estimate amount of time for maintenance per live implementation 	[Add link to location in your KB/Teams Channel]	

Insights Reports: Error Report	<ul style="list-style-type: none"> • Share this with your IS/Product teams to ensure they're in alignment with what changes may impact your content • Shows the deployable type, name and status of the item 	<ul style="list-style-type: none"> • Insights (US) • Insights (EU) 	Learn more about this and other reports that are available to you
WalkMe Share	<ul style="list-style-type: none"> • Streamlined cross-functional review process for WM content • Export content for KB knowledge management 	share.walkme.com (log in with Editor credentials) or through WalkMe Editor	WalkMe Share Support Article
Activity Board	<ul style="list-style-type: none"> • Overview of account status (number of systems, number of items in production, number of team members) • Identify what's working and what's not, and leverage learnings to optimize content 	console.walkme.com/activity-board	Learn more on this tool
Advanced Search	<ul style="list-style-type: none"> • "Find and Replace" to locate content dependencies and complete bulk updates easily 	In the WalkMe Editor	Learn More: Tip Tuesday video

Connect with Peers via the WalkMe Community

Make it real! [Visit the WalkMe Community and join Strategy & DAPtics](#) - a peer-led group that meets monthly to share resources and discuss Digital Adoption strategy.