

Engagement Methods

How would you like users to access your Smart Walk-Thrus? WalkMe offers a wide variety of methods for you to deliver training, support, and promotion to your users. This article will help you learn about the different ways users can engage with your Smart Walk-Thrus and other WalkMe resources.

The Short Version

Building a successful implementation is much more than a creating a set of Smart Walk-Thrus that guide users through important processes. A successful implementation is a whole solution that takes advantage of the full suite of WalkMe Apps and features to provide users the support they need, when they need it, and in the way they need it.

Some methods of engagement require more user initiative, and some require less. Depending on your business objective, consider how users will most usefully access the resources available to them in WalkMe. Below are some suggestions of methods that may be used by business objective:

1. **Use WalkMe to reduce support calls:** Use methods of engagements that enable users to access support as needed. Configure and organize the Player Menu so that it is easy to use and navigate to the needed Smart Walk-Thru or support resource, turning in into a 24/7 support center. Create a ShoutOut encouraging new users to check out the support available to them in WalkMe. Place Launchers where you think users may need immediate assistance.
2. **Use WalkMe for onboarding and training:** Use methods of engagement that encourage users to complete training and become aware of learning resources. Use Onboarding lists to drive users to complete Smart Walk-Thrus that will teach them important processes. Promote Onboarding with a ShoutOut. Follow up a formal training on a process with an email Permalink that will launch the site and start a Smart Walk-Thru giving the user a refresher on what they learned. To teach users about a new feature, set a Smart Walk-Thru to play automatically at the appropriate time.
3. **Use WalkMe to promote free users to paid:** Use methods of engagement that require less user initiative. For example, configure a Welcome balloon to play automatically the moment a user enters your website, offering assistance and focusing them on the part you wish to highlight. This proactive method encourages a user to go down a specific path rather than relying on them to find their way around your website. Place Launchers in strategic locations to ensure maximum engagement with your site. Use Onboarding to highlight key features of your platform.

The available methods of engagement with a Smart Walk-Thru are:

- **Player Menu:** Place the Smart Walk-Thru in the Player Menu. The Player Menu gives users ability to seek support when they need
- **ShoutOut:** Use a ShoutOut with an action button to start a Smart Walk-Thru. ShoutOuts create a strong call to action to start the Smart Walk-Thru
- **Auto Play:** Configure a Smart Walk-Thru to start automatically. Auto Play ensures that your user will experience the Smart Walk-Thru
- **Launcher:** Place a Launcher starting the Smart Walk-Thru on the relevant page. Launchers allow users to easily find help at their point of need
- **Onboarding List:** Associate a Smart Walk-Thru with a task. Tasks compel users to complete a process as part of their training
- **Permalink:** Create a permalink that will open your site and launch the Smart Walk-Thru. Permalinks enable users to access the Smart Walk-Thru via an email or external support site

Continue reading for more ideas about which methods of engagement is right for you.

How It Works

Player Menu

The Player Menu appears in the Help tab of the widget and is a central repository for all Smart Walk-Thrus, Resources, and Shuttles. After creating one of these items, it will automatically appear in the Player Menu when published. You can choose not to have it appear in the Player Menu by removing it from the Menu Organizer.

Users can search the Player Menu for whatever they need – they don't need to rely on looking outside in order to complete their tasks. Visitors and free trial users, who are not familiar with your website, can simply search for help and start the relevant tutorials for various processes. In this way, the Player Menu becomes an integrated knowledge base and search tool where all relevant support information is housed in one place.

There are various things to keep in mind about users playing Smart Walk-Thrus through the Player Menu.

Consider the user experience of interacting with the Player Menu; the more usable, the more likely they are to use it. Users are more likely to utilize the items in the Player Menu if they have straightforward and clear names. Whether it's "How do I create a Lead", "Create a Lead", or "Creating a Lead", remain consistent with naming conventions. For Smart Walk-Thrus aimed at marketing or promotion, you may want to use a more noticeable name, for example, "Enter to Win!" You may also add a description if desired to provide additional information.

Consider how users are likely to use the Player Menu and tailor the Smart Walk-Thru displays accordingly. Are your users looking at the Player Menu out of curiosity to learn more about your site? These users are more likely to scroll through the Player Menu, making it particularly important

to use Segmentation so that only relevant items appear and they are not overwhelmed by information. Are users likely to be looking for troubleshooting help? These users are more likely to use the search field to find the Smart Walk-Thru of interest than scroll. Make sure that appropriate keywords are set.

The Player Menu alone may not always be the best engagement method. For example, if a user may not know a Smart Walk-Thru exists, think to look for it, or think that they need it, try another method that requires less user initiative such as a Launcher or ShoutOut. If a Smart Walk-Thru is only relevant in a very particular situation, you may want to use another method that will actively engage the user at that time or segmenting the Smart Walk-Thru so it only appears on a relevant page.

ShoutOuts

ShoutOuts can be created with an Action Button that will start a Smart Walk-Thru or a Resource, Shuttle, Survey, SmartTip set, or open the Player Menu. ShoutOuts draw a user's attention to an important message and create a strong call to launch an action.

Importantly, ShoutOuts will only be effective if they reach the right user at the right time. If they are incorrectly configured the ShoutOut may not reach the user at a relevant time or it may play too often and annoy the user. Carefully check your segmentation settings and auto play settings. When the Auto Play or Segmentation rule is true the ShoutOut will play automatically. Also, check cancel auto play settings. For example, set the ShoutOut to stop playing only after the user has clicked the Action button, this will ensure that they have seen the Smart Walk-Thru. Alternately, set the ShoutOut to only stop playing once the goal of the Smart Walk-Thru has been met or an Onboarding task has been completed. Use the rule type User Activity - Onboarding Task so that it will continue playing until the user has achieved the goal configured to the task with the related Smart Walk-Thru.

Change the design, colors, and style of the ShoutOut to maximize its ability to catch the user's attention. Use the Rich Text Editor to link to other Smart Walk-Thrus in the text of the ShoutOut, add Dynamic Text, or add a video. [Read More »](#)

Auto Play

A Smart Walk-Thru or ShoutOut with Auto Play will play for your user without any proactive user action. Auto Play is particularly useful when a user may not know of a WalkMe item available or think to seek out help on their own. If there is a common process that people make mistakes on you may want to use Auto Play. Any Smart Walk-Thru or ShoutOut with Auto Play enabled will start automatically when the Auto Play Rule you create is True.

WalkMe can be very proactive and engage with your users the moment they enter your website. If you want a new employee to enter your application and know exactly what they need to do without having to rely on their manager, training sessions or onboarding sessions. WalkMe can alert users of new website changes or new features/processes with a popup balloon that can be configured to

appear either on certain dates or to specific user groups or user profiles. [Read More »](#)

Launcher

When clicked, Launchers can start a Smart Walk-Thru, activate a Resource, Survey or Shuttle, play a ShoutOut or set of SmartTips. Launchers engage users while providing a proper context for your help, supporting users who are on complicated pages or faced with complex tasks. Launchers can start a Smart Walk-Thru, turning a call-to-action into a process that is easily followed by a user. Launchers are also commonly used to seeking feedback from users with a Survey, or even redirect users to templates or forms.

Launchers suggest help in strategic points and highlight new features to ensure maximum engagement. They can be placed strategically on certain pages where you want to encourage a call to action or highlight special features to increase engagement and conversion rates. Launchers can also help eliminate confusion – when making a decision to move from free to paid, the ease of navigation through your website is always a major factor. If a user is on your help page, Launchers can appear prompting them to complete a Smart Walk-Thru for various processes they have difficulties with. Alternatively, if a user has managed to get to a certain point in a process but is having trouble getting to the end, a Launcher can be placed in the middle of a process to guide the user in completing it. [Read More »](#)

Permalink

Permalinks are direct links to your website that automatically start a Smart Walk-Thru when clicked. A Permalink is ideal for engaging users who are not currently on your website. Use a permalink in emails, newsletters, and social media, to redirect users to a page and launch a Smart Walk-Thru. These links can be embedded into other resources in order to offer a “Click Me” call-to-action that will immediately guide users through a process.

For example, send an email updating users on a new feature with a Permalink that opens your site and launches a Smart Walk-Thru that guides users through using the new feature or Send a welcome email to new account holders with a Permalink that will help users begin the onboarding process. With a Permalink you can give users WalkMe access even when they are not on your site but at the time when you anticipate they need it, rather than waiting for training sessions or team meetings. [Read More »](#)

Related Resources

- Learn about [best practices for Smart Walk-Thrus](#)
- Read about [building goals to track user success and show value](#)
- Read more methods of drawing attention to WalkMe on your site with Animations, an Attention Grabber, or CSS