

ShoutOuts: Getting Started Guide

Brief Overview

ShoutOuts are custom balloons designed to draw your user's attention to the featured text. ShoutOuts can be built with an action button that will launch another WalkMe item; with just one click the user can start a Walk-Thru, play a video, or access an article through a Resource, activate a Shuttle to another page, or open the Player Menu.

When planning your WalkMe solutions, consider how you would like to communicate information to your users. Instead of relying on your user to seek out information that they might not even know exists, ShoutOuts automatically appear and guarantee users see your message. Add an action button to the ShoutOut that provides additional guidance with a Walk-Thru, important information with a Resource, or link to a relevant site.

□□Tip: [WalkMe Compass Guide](#)

[WalkMe Compass](#) offers in-app, step-by-step guidance to help you on this subject. Click on the link below to be redirected to the WalkMe Editor. You must be logged in to your editor in order for the guidance to launch.

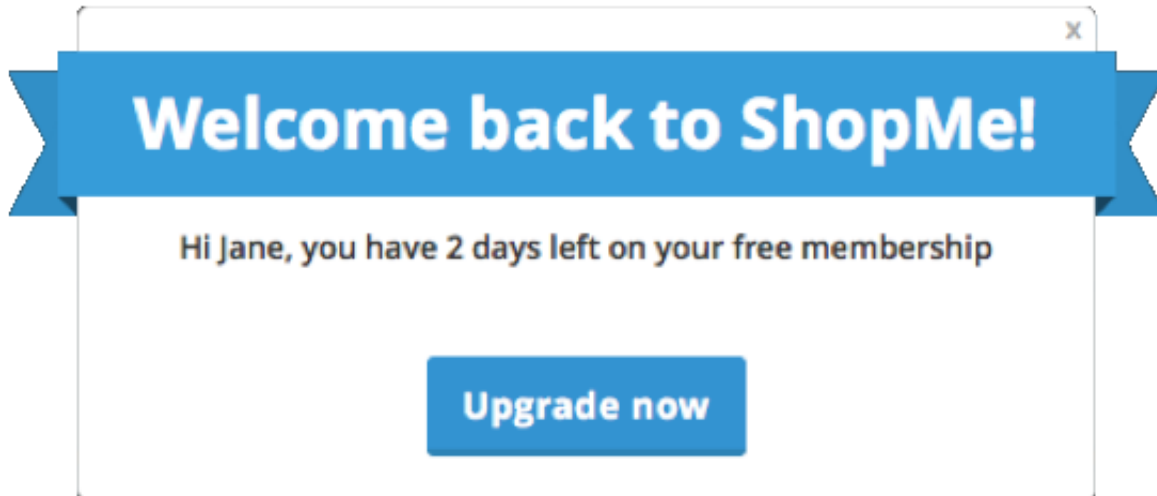
□ [View the ShoutOuts Getting Started Guide](#)

Use Cases

- Announce site changes;
- Inform users of upcoming site maintenance or downtime;
- Remind trial users of time remaining in free trial account;
- Direct users to the support portal;
- Prompt employees to complete assigned online tasks;
- Promote new features, promotional events, or premium services.

For example, create ShoutOuts for free trial account users that reminds them of the remaining number of days in their trial with an action button that activates a Shuttle to

bring them to the upgrade page. Include dynamic text for a more engaging ShoutOut.



How it Works

Unlike step balloons, ShoutOuts are not attached to an element on the page, rather they will appear in a fixed place in the center or around the perimeter of the page. A ShoutOut can be played via a Launcher, Permalink, or Auto Play.

To enable [Auto Play](#), create a rule in the [Rule Engine](#) to determine when the ShoutOut will activate. WalkMe will constantly check for the conditions identified in the rule and [Segmentation Center](#) and once true, the Shout will automatically play without any active prompt from a user action. All the standard Rules can be used to determine under which conditions Auto Play will activate (i.e. URL, On Screen Element, jQuery, etc).

In addition to Auto Play rules to determine when the ShoutOut should play, set frequency options to determine how often the item should play. The engagement frequency options include: Once, Once a Day, and Always.

Pro-Tip!

Set up ShoutOut Goals so you can keep track of whether the ShoutOut is influencing user action.

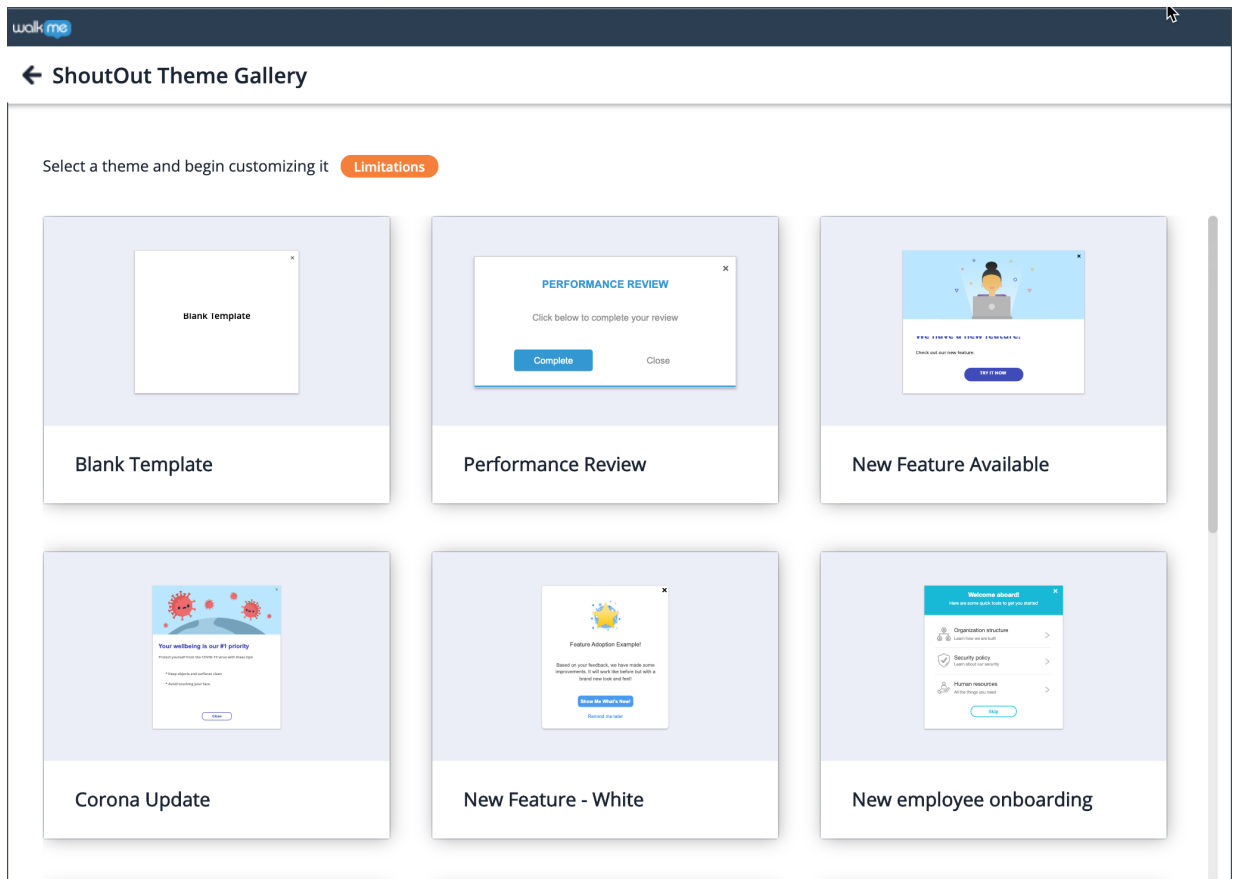
Create a ShoutOut

There are 2 types of ShoutOuts available for creation, ShoutOuts using the [Visual Editor](#) and Classic ShoutOuts. This guide will focus on the new ShoutOut interface

- In the WalkMe Editor, click the orange plus sign and select ShoutOut:



- Name the ShoutOut. (This name will not be visible to your end-users.)
- At this point, the ShoutOut Theme Gallery will open automatically, presenting you with a range of template options for your ShoutOut's design:



-

Please Note:

Unlike creating a Walk-Thru or Launcher, WalkMe does not go into Capture Mode. This is because the ShoutOut will appear directly on the page; either in the center or any point around the periphery where you have set it.

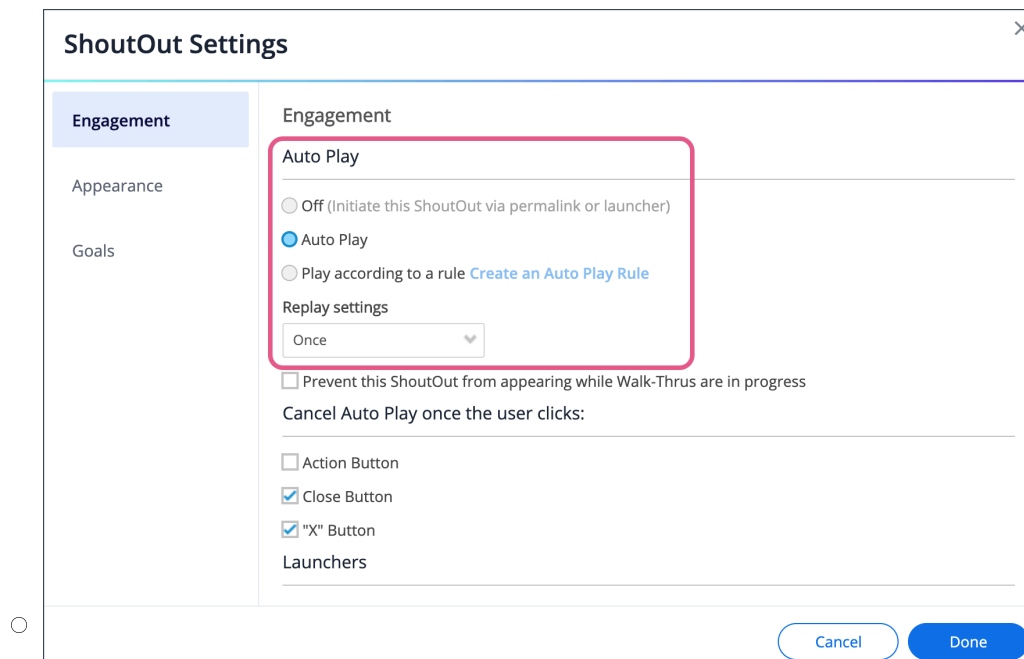
- Select your chosen template and use it as is! or customize it using the [Visual](#)

Note: Though each theme was built with a specific use case in mind, you can choose the theme based on the style that works for your needs. All of the text in each template is customizable. Each template can be edited to serve any use case.

- You can edit the text of any part of the ShoutOut directly in the ShoutOut preview.
- Click a button in the preview to edit the button's action.
 - None
 - Remind Me Next Time: The next time the page refreshes and Segmentation conditions are met
 - Remind Me After One Day: The next day after Segmentation conditions are met
 - Play Smart Walk-Thru
 - Open Menu
 - Play Resource
 - Play Shuttle
- Click the Add New Object button to add additional content to the ShoutOut. Drag any desired elements into the ShoutOut preview.



- Click the Settings icon to set up Display Conditions:
- You can choose from the listed AutoPlay Rules:
 - AutoPlay Rules (RECOMMENDED): Choose conditions to AutoPlay the ShoutOut)
 - Turn AutoPlay Off: Trigger the ShoutOut using a Launcher.
 - AutoPlay: Play when the user reaches any page of your site.



- To set up AutoPlay Rules, select AutoPlay Rules, then click Create an AutoPlay Rule:
The AutoPlay Rules should always begin with a URL, so that WalkMe only checks the AutoPlay conditions on the correct page. The URL rule may be the only rule needed, but you can also add additional rules based on user actions.
- You can then adjust Replay Settings for the AutoPlay Rule.
 - Once a Day: plays the first time the AutoPlay rules are true each day
 - Once: plays only once
 - Always: plays every time the AutoPlay Rules are true
- You can also choose when to Cancel the AutoPlay Rules for the ShoutOut. The AutoPlay will stop when the user takes any of the checked actions. **RECOMMENDED:** Cancel the AutoPlay only when the user clicks the Action Button. This will ensure that the user has interacted with the ShoutOut's linked content before canceling the AutoPlay.
- Click Done to save the ShoutOut settings, and then click Save to save the ShoutOut.

Engagement

In the Engagement tab, determine how the ShoutOut will play:

ShoutOut Settings
✕

Engagement

Appearance

Goals

Engagement

Auto Play

Off (Initiate this ShoutOut via permalink or launcher)

Auto Play

Play according to a rule [Create an Auto Play Rule](#)

Replay settings

Once

Prevent this ShoutOut from appearing while Walk-Thrus are in progress

Cancel Auto Play once the user clicks:

Action Button

Close Button

"X" Button

Launchers

Launchers create a strong call to action on difficult pages or complicated tasks. Add one now to create

- Off: ShoutOut can be played via Permalink or Launcher;
- AutoPlay: ShoutOut automatically displays on pages that have WalkMe installed;
- Play according to a rule: Use the Rule Engine to determine when a ShoutOut automatically plays. The ShoutOut will display when the rule is true;
- Replay settings: Select how frequently ShoutOut appears. Choose between Once, Once a Day, Always, it is also possible to enable ShoutOuts to not play while a Smart Walk-Thru or another ShoutOut is in progress:

ShoutOut Settings ✕

Engagement

Appearance

Goals

Engagement

Auto Play

Off (Initiate this ShoutOut via permalink or launcher)

Auto Play

Play according to a rule [Create an Auto Play Rule](#)

Replay settings

Prevent this ShoutOut from appearing while Walk-Thrus or other ShoutOuts are in progress

Cancel Auto Play once the user clicks:

Action Button

Close Button

"X" Button

Launchers

Cancel
Done

- Cancel Auto Play: Select which user action will cause the ShoutOut to stop showing the ShoutOut;
- Launchers: Use a Launcher to play a ShoutOut;
- Permalink: Create a link to load a webpage and play a ShoutOut.

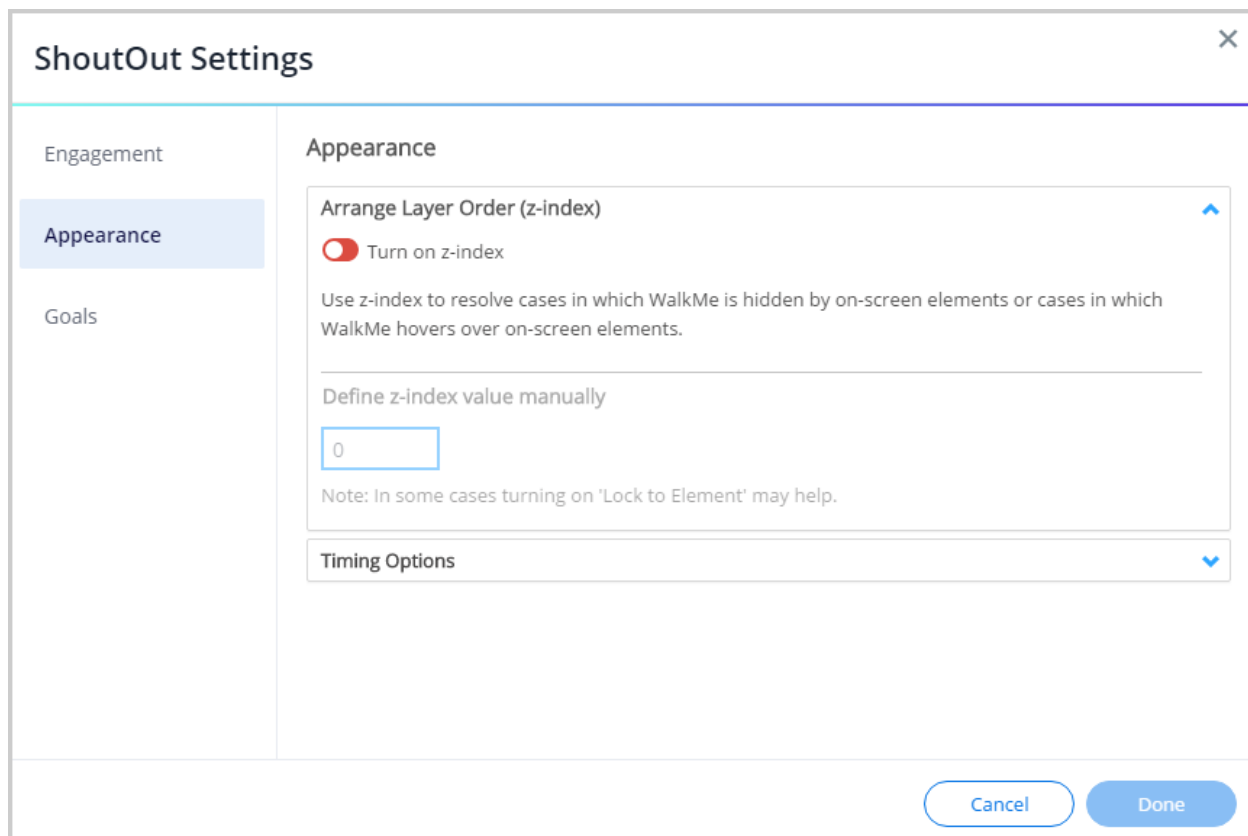
Appearance

In the Appearance tab, you can arrange the layer order (Z-order) of your ShouOut on the screen, making sure that your ShoutOut appears correctly, and is not hidden behind other elements.

Select the timing properties of your ShouOut, if you would like to add a delayed appearance.

Note:

Timing options are only available to auto-played ShoutOuts



Goals

Create Goals related to your KPIs to measure the efficacy of a ShoutOut. Just like WalkThrus, ShoutOuts have Main Goals and Milestones Goals. The goals will begin to be checked as soon as the ShoutOut has been played and will continue to track for two hours after.

For example, a ShoutOut that announces remaining days in a trial account with an action button to the upgrade page could have a goal that measures how many users actually upgrade as a Main Goal and visits to the upgrade page as a Milestone. Even if someone does not immediately upgrade upon seeing the ShoutOut, if they decide to upgrade within the next two hours you will be able to track completion.

ShoutOut Settings

Engagement

Appearance

Goals

Goals²

To track users success rate and progress in this process, set a Main Goal and Milestones.

[Set a Main Goal](#)

Cancel
Done

ShoutOuts in Insights

Track ShoutOuts in Insights. From the ShoutOut dashboard, view how many times each ShoutOut has played, how many times the Action button has been clicked, and how many goals completed.

[SYSTEMS OVERVIEW](#) | [INSIGHTS](#) | [ACCOUNT](#) | [VISIONS](#)

HR@walkme

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ShoutOuts

All Sessions
Last 7 Days
Jun 4, 2019 - Jun 10, 2019

Users Viewed ShoutOuts

526

86.9% of total users WalkMe was available to

ShoutOut Views

1,487

2.8 views per user

ShoutOut Action Buttons Clicked

110

7.4% of views resulted in action button click

ShoutOuts Summary

	Name	Users Viewed	Shoutout Views	Action Buttons Clicked <small>(of ShoutOut views)</small>	Last Published
	Post Share	443	1,112	64 (5.8%)	06/05/2019
	ReplaceMe	230	375	46 (12.3%)	06/10/2019

Showing all results

