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Latest Version: 4.1

1. Unified Scenario Simulation
2. Micro Skill Drill Exam

Topic: 1

Unified Scenario Simulation

Meridian Freight Group Drives Adoption of Its New Cloud CRM

Business Context

Meridian Freight Group is a regional logistics provider operating road and rail freight across Sweden, Denmark, and Norway. To replace a patchwork of spreadsheets and an aging quoting tool, the company has rolled out a new cloud-based CRM and quoting application to its commercial and operations teams. Leadership sees the rollout as a step in a broader digital transformation and has engaged a digital adoption consultant to deploy WalkMe so that employees actually use the new system rather than reverting to old habits.

Adoption Mandate

The sponsor, a commercial operations director, has set a clear expectation: users should reach confident daily use quickly, and the volume of support tickets raised against the new application should fall within the first rollout wave. The consultant has been asked to build in-application guidance that helps people complete real work in the tool, not to deliver a separate classroom course.

User Landscape

Two groups depend on the application in very different ways. Sales coordinators work in it for most of the day and rely heavily on a multi-step quote-creation form that the business considers central to revenue. Warehouse dispatchers open the system only occasionally, mainly to confirm a delivery window, and need little more than an occasional reminder about one field that they frequently fill in incorrectly. The two groups sit in different parts of the organization and have different tolerance for on-screen prompts.

Early Rollout Observations

During the pilot, the consultant noticed that many coordinators paused or abandoned partway through the quote form, while a login announcement banner that summarized the new process was being dismissed almost immediately by most users. Dispatchers, meanwhile, continued to enter the problematic field in the wrong format despite the banner having mentioned it. Early figures suggested that guidance was being shown widely but completed rarely.

Reporting Context

The director wants an engagement dashboard to demonstrate the value of the rollout to the regional board. When the consultant first reviewed the early numbers, however, the same individuals appeared to be counted inconsistently across sessions, and group totals did not reconcile with the known headcount. The way users were being recognized by the platform had not been set up cleanly, which left the data difficult to trust.

Build Approach

With the next go-live wave only days away, the project team has felt pressure to build quickly. One suggestion on the table is to assemble a single large walk-through covering every screen and show it to everyone, on the assumption that more guidance is always better. The consultant is weighing that against a more targeted approach that matches each piece of content to a specific task and a specific audience.

Validation Context

Before the wave is published, the team needs confidence that the guidance behaves correctly for real users in the live application and that what is measured afterward will genuinely reflect adoption. The consultant must decide how to validate the content, how to target it, and how to read the engagement data once it begins to flow.

Your assignment

You are acting as the digital adoption consultant engaged by Meridian Freight Group. The commercial operations director expects fast, confident adoption of the new cloud CRM and quoting application and a measurable fall in support tickets within the first rollout wave. You must advise on how to build, target, validate, and measure in-application WalkMe guidance for two distinct user groups under a tight go-live timeline. Provide recommendations consistent with WalkMe's success methodology and building best practices

1. CHALLENGE 1 — Selecting the Right WalkMe Content Type for the Goal

- Advise which WalkMe content type best supports sales coordinators completing the multi-step quote-creation form as they work.
- Recommend the least disruptive content type for dispatchers who only need an occasional reminder about one field's correct format.
- Explain how WalkMe's success methodology should guide which guidance to build first, given limited time before go-live.

Checkpoints

- Each recommended item is justified against a specific user task rather than a desire for comprehensiveness.
- The lightest content type that achieves the goal is preferred over broader or more interruptive options.
- Build priority follows evidence of where users actually struggle.

2. CHALLENGE 2 — Targeting Guidance with Conditions and Segmentation

- Recommend how to ensure each user group sees only the guidance relevant to its role and tasks.
- Advise on the display logic that limits a tip to the correct page and the correct audience.
- Position a recommendation where a stakeholder wants maximum reach for an announcement while relevance and user attention are also at stake.
- Diagnose why early engagement reports and segment counts appear unreliable.

Checkpoints

- Targeting uses segmentation and conditions rather than verbal instructions to skip steps.
- Display logic is bound to both page context and audience.
- The recommendation weighs awareness against notification fatigue and relevance.
- The root cause of distorted reporting is traced to how users are identified.

Question: 1

CHALLENGE 1 — Selecting the Right WalkMe Content Type for the Goal

Sales coordinators repeatedly pause or abandon the multi-step quote-creation form, which the business treats as central to revenue.

Which WalkMe content type best supports them as they work through that form?

A. A ShoutOut shown at login that summarizes the full quoting process so that users can read it before they begin.

- B. A Smart Walk-Thru that guides users step by step through the quote-creation form while they complete it.
- C. A Resource link to a PDF of the quoting procedure, made available from the menu for users to read.
- D. A Launcher beside the menu that opens the company training portal in a separate browser tab.

Answer: B

Explanation:

A Smart Walk-Thru delivers in-context, step-by-step guidance overlaid on the actual form, which is exactly what a multi-step task with high drop-off needs. It keeps users moving through the real screens rather than asking them to remember instructions or leave the application.

Question: 2

CHALLENGE 1 — Selecting the Right WalkMe Content Type for the Goal

Dispatchers open the application only occasionally and mainly need a reminder about one field they often complete in the wrong format.

Which approach gives them the help they need with the least disruption?

- A. Build a full Smart Walk-Thru covering the entire dispatch screen and run it again for every single dispatcher session.
- B. Display a ShoutOut each time a dispatcher opens the screen, describing the required format of the field.
- C. Add a SmartTip on the field that shows the required format when the dispatcher focuses or hovers over it.
- D. Place an always-on Launcher that restarts a guided flow automatically every time the screen loads.

Answer: C

Explanation:

A SmartTip attaches contextual help directly to the field and appears only when the user interacts with it, which matches an occasional, single-field need with minimal interruption. It corrects the specific mistake exactly where it happens without imposing on a light-use group.

Question: 3

CHALLENGE 1 — Selecting the Right WalkMe Content Type for the Goal

With limited time before go-live, the team debates how to decide which guidance to build first. Following WalkMe's success methodology, what should drive that decision?

- A. Use evidence of where users actually struggle to decide which experiences to build first, rather than building broadly.
- B. Build the largest possible number of walk-throughs first and review later which ones users happened to open.

- C. Prioritize whichever content is the fastest to build so that the go-live date is met regardless of where users struggle.
- D. Reproduce the vendor's generic demo content because it already covers the application comprehensively.

Answer: A

Explanation:

WalkMe's success methodology turns data into action and then into experiences, so guidance should be built where engagement evidence shows users struggle most. Starting from the abandoned quote form directs limited effort to the highest-impact need.

Question: 4

CHALLENGE 2 — Targeting Guidance with Conditions and Segmentation

Sales coordinators and dispatchers need different guidance, and showing each group the other's content creates noise.

What is the best way to ensure each group sees only what is relevant to it?

- A. Publish one combined Smart Walk-Thru and verbally tell users to skip the steps that do not apply to them.
- B. Build content for sales coordinators only, since dispatchers can ask a coordinator for help when needed.
- C. Duplicate every item twice and manually switch items on and off each morning for each user group.
- D. Use segmentation so each group is shown only the content relevant to its role and its tasks.

Answer: D

Explanation:

Segmentation targets content to defined user groups so each audience sees only what applies to it, which removes noise and keeps guidance relevant. It is the built-in mechanism for serving two groups with different needs from the same WalkMe deployment.

Question: 5

CHALLENGE 2 — Targeting Guidance with Conditions and Segmentation

A tip for coordinators should appear only on the quote screen and only for that group.

Which display logic achieves this correctly?

- A. Show the tip on all pages and rely on users to ignore it wherever it does not apply to them.
- B. Use a condition that displays the tip only when the active page is the quote screen and the user is in the sales-coordinator segment.
- C. Use a condition based only on the time of day at which the user happens to log in to the application.
- D. Show the tip to every user for the first week and then remove the display condition entirely.

Answer: B

Explanation:

A condition that combines page context with audience ensures the tip shows only where it is relevant and only to the right users. This matches both criteria the scenario requires and prevents the tip from appearing out of context.

Topic: 2

Micro Skill Drill Exam

Question: 6

Cedarhurst Utilities recently rolled out a new cloud-based billing application to its 900 back-office staff. Leadership is proud that every employee now has a login and that the software was delivered on schedule, and they describe the project as "digitally transformed." Three months later, the operations director notices that many agents still complete billing corrections by exporting data and editing it outside the system, and support tickets about the new application remain high. She asks a digital adoption consultant whether the rollout has actually achieved digital adoption, or only something narrower. She wants a clear, defensible framing she can present to the steering committee before approving further investment.

As the consultant, how should you characterize what the project has achieved so far, and what digital adoption additionally requires?

- A. The rollout achieved full digital adoption, because every eligible employee now holds a working login and the application went live on its planned schedule.
- B. The project delivered new technology and access, which is transformation; adoption is reached only when users effectively use the software for their intended tasks.
- C. Adoption was reached at go-live, and the continuing ticket volume simply reflects the ordinary support demand any newly launched enterprise application generates.
- D. Digital adoption and digital transformation describe the same outcome, so making the application technically available to all staff has satisfied both at once.

Answer: B

Explanation:

Deploying new software and granting access reflects transformation, but adoption is the goal that transformation is meant to enable. The workarounds and sustained tickets show effective use has not been reached, so this framing is the defensible one.

Question: 7

Kessel & Roy, a mid-sized legal-services firm, has adopted a Digital Adoption Platform to support a newly launched matter-intake application. The managing partner is enthusiastic and asks the consultant to build rich, step-by-step guidance for every screen and every field in the application at once, reasoning that "more guidance is always better adoption." The consultant knows the firm has limited internal capacity to build and maintain content, and that intake staff perform only a few high-value tasks

frequently. The partner wants the consultant to recommend how to set the initial adoption goal so effort is well spent.

How should the consultant advise the firm to frame its initial adoption goal?

- A. Build exhaustive guidance covering every screen and every field immediately, on the belief that broader coverage will always translate into stronger overall adoption for the firm.
- B. Start from the firm's business goals and the tasks intake staff perform most often, build focused guidance for those, and expand later as evidence shows need.
- C. Prioritize whichever screens were simplest to build guidance for first, regardless of how important those particular tasks actually are to the intake staff's day-to-day work.
- D. Postpone building any guidance at all until the firm can commit the resources to cover every screen together, so that users are never exposed to only partial coverage of the application.

Answer: B

Explanation:

Anchoring the goal to defined business goals and the high-frequency tasks staff actually perform focuses scarce effort where it produces adoption, and expanding later on evidence keeps the program sustainable. This is the strategic framing the firm needs.

Question: 8

Marisol Foods, a food-distribution company, has deployed a Digital Adoption Platform over its order-management application. During the kickoff, the program sponsor tells the consultant she expects the platform to "install the new software for us and take over managing the servers." Her team has heard the platform described as a way to help users adopt applications, but they are unsure what role it actually plays relative to the underlying application. The consultant is asked to set expectations clearly so the project charter reflects an accurate scope of what the platform will and will not do.

Which statement best describes the role a Digital Adoption Platform plays in this deployment?

- A. It overlays guidance and automation onto the existing order-management application to help users complete tasks, without replacing or hosting that application.
- B. It fully replaces the order-management application, so the company no longer needs to operate, license, or maintain the original software once the platform is switched on.
- C. It takes over provisioning and administration of the company's application servers, moving day-to-day infrastructure operations away from the internal IT team going forward.
- D. It works purely as a reporting dashboard that summarizes past order volumes, and it never presents any in-application guidance to users while they are actually working.

Answer: A

Explanation:

The platform overlays guidance and automation onto the existing application so users can complete their tasks within it. It neither hosts nor replaces the underlying software, which is exactly the scope the sponsor needs reflected in the charter.

Question: 9

Norvik Air, a regional airline, is planning a digital adoption program across two employee groups on the same crew-scheduling application: experienced dispatchers who use advanced functions daily, and newly hired ground coordinators who need help with only a handful of basic tasks. A junior analyst proposes building one identical set of guidance and showing it to everyone, arguing it is simpler to maintain. The consultant is asked to recommend a foundational approach that will keep guidance relevant to each group and avoid frustrating experienced users with help they do not need. Which foundational approach should the consultant recommend for delivering guidance to these two groups?

- A. Align guidance to each group's tasks and needs, so experienced dispatchers and new coordinators each see the content that is relevant to their own work.
- B. Build guidance only for the experienced dispatchers, on the assumption that the newly hired ground coordinators will pick up the basic tasks on their own without any support.
- C. Show one identical set of guidance to every user regardless of their role, since a single shared version is by far the simplest thing for the small team to maintain over time.
- D. Remove all guidance shortly after launch for both of the groups, so that no user is ever shown help that might turn out to be irrelevant to that particular person's role.

Answer: A

Explanation:

Aligning content to each group's tasks and needs delivers the right guidance to the right users, keeping help relevant and reducing noise for those who do not need it. This targeting principle is foundational to sustaining adoption across mixed user populations.

Question: 10

Talvora Logistics is preparing a business case for continued investment in its digital adoption program after the first quarter. The finance lead wants a single primary measure that shows the program is delivering value, and he proposes tracking how many employees have been granted a license to the new transport-planning application. The consultant is concerned that this measure would not demonstrate the outcome the program exists to produce. Leadership has asked the consultant to recommend which measure most directly reflects whether digital adoption is being achieved, so the business case rests on the right evidence.

Which measure most directly reflects whether the program is achieving digital adoption?

- A. The total size of the software budget that has been approved and allocated to the transport-planning application for the whole current year.
- B. The extent to which users are actually completing their intended tasks inside the application, shown by real engagement with the workflows.
- C. The number of internal project meetings the program team has held to plan and coordinate the digital adoption rollout across this quarter.

D. The number of employees who have simply been granted a license to the transport-planning application during the current reporting quarter.

Answer: B

Explanation:

Adoption is defined by effective, intended use of the software. Evidence that users are actually completing their intended tasks and engaging with the workflows speaks directly to that outcome, which is precisely what the business case needs to demonstrate value.

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