Panaya

WALKME: FINDING THE SOURCE & FIXING THE PROBLEM

ForeSight enables WalkMe to enhance developments and mitigate risk within their Salesforce platform

walkme

CUSTOMER PROFILE
Cloud Computing Company

WEBSITE
https://www.walkme.com/

LOCATION
Global

NEED
- Reduce time and effort for org enhancements
- Quickly debug errors and failures
- Improve the efficiency of Salesforce deliveries
- Risk mitigation
- Clear view leading to faster ramp up for new system admins/ developers

THE IMPACT
- Fast resolution of critical faults
- Incident reduction
- Multiple hours of work saved
- Improved Salesforce org project planning

ABOUT WALKME

WalkMe, a leading provider of digital adoption solutions, maximizes and accelerates the impact of digital transformation strategies by driving user adoption of digital assets. WalkMe is trusted by over 2000 leading companies such as IBM, Red Hat, Nestlé, and PayPal. Using a cloud-based Digital Adoption Platform, users can navigate websites and SaaS applications to accomplish any task.

THE CHALLENGE

Salesforce is a dynamic platform that changes rapidly to match to the organization's changing needs.

As the business evolved, WalkMe's Salesforce org became increasingly complex and over the years the org accumulated overflows of automations, duplications, many unused components and undocumented technical dependencies.

To avoid business-critical problems and failures, WalkMe had to investigate thoroughly before making a change and be extra careful when applying a change, even to a single element. They often did not know which other components will be affected by a particular change, making it very time-consuming to map out and find all the dependencies.

This complexity proved even more challenging when faced with the need to identify the root cause of issues, especially when the problem had to be solved in a timely manner, such as cases where a technical failure has a direct impact on company's revenue.

Whether it was a manual investigation to prevent issues or finding the source of the problem after it already occurred, this exploration phase was very tedious and created a lot of frustration and time spent for Global VP Information Systems Tal Carmi and the WalkMe Salesforce team.

> *"One of the main reasons we use Panaya is because no one can genuinely remember how all components of the system work, and many times there isn't enough documentation on the process that has been done. Instead of searching in countless workflows, process builders, flows, validation rules or apex classes to understand what is affected by every change, we get a clear view in one click."*

Tal Carmi, *Global VP Information Systems, WalkMe*

THE SOLUTION

Before Panaya, the team spent hours exploring all the connections and mapping the dependencies within Salesforce. With Panaya ForeSight, all the manual work of investigating and understanding what is related to a specific field or a process is done with just a few simple clicks. It became imperative when making a significant or complex change, especially one tied to core business processes. This is not something WalkMe wanted to risk.

It is not just about the time Panaya ForeSight saves. It is also about the employee experience. Digging through countless elements for hours, just to find out a small change had to be made to prevent failure is much more frustrating than working for hours on innovation. ForeSight has also significantly improved the onboarding process of new team members that are not familiar with the WalkMe Salesforce org.

Panaya ForeSight also helps resolves issues quickly and easily. Using the platform's comfortable search option, WalkMe immediately finds all elements related to a field displaying unexpected behavior, quickly narrowing down the potential root causes. This has allowed the team to efficiently find and fix issues, before they affect the business users or the company's revenue.

THE RESULT

The ForeSight platform allows WalkMe to either find problems in advance or fix them on demand whenever an error occurs. The assurance that the error can be found quickly and save precious time is priceless, as it allows faster development time and shorter time to market.

The most significant impact of using Panaya is knowing they can trust the platform for a fast and risk-free solution.

THE EXAMPLE

On December 31st, one of WalkMe's vendors did not renew WalkMe's subscription in their systems due to a vendor-internal mistake. The vendor's service was part of a critical business process in WalkMe's Salesforce org. So when the subscription expired in the vendor's systems, removing access to its fields in WalkMe's Salesforce org, the WalkMe team woke up on December 31st, a Friday, to an emergency state. The most significant business day of the year, being the last day of the last quarter, with any edit to any Opportunity in the system resulting in a red failure message.

> *"We had no idea what caused this problem, so we used ForeSight to figure it out, and we managed to locate the root cause of the issue in about half an hour. Panaya saved us hundreds of thousands or even millions of dollars in timely revenue"*

Tal Carmi, *Global VP Information Systems, WalkMe*

In this case, ForeSight helped WalkMe fix the issue in no-time, minimizing the effect on the business, allowing the Sales team to close the end of the quarter and the year uninterrupted. Had they not used Panaya, it would have taken them hours, maybe a day, to locate the root cause and fix it, which, of course, would have affected the revenue and the overall business results for the entire year.

ABOUT PANAYA

Panaya enables organizations to accelerate application change and continuously deliver innovation with its Change Intelligence Platform. Panaya provides cloud-based application delivery and testing solutions that ensure collaboration between Business and IT. Enabling enterprise agility with faster release velocity and uncompromising quality, Panaya delivers an optimized user experience with end-to-end visibility of the application lifecycle. Since 2006, 3,000 companies in 62 countries, including a third of the Fortune 500, have been using Panaya to deliver quick quality change to enterprise ERP & CRM applications.