

Software Userization: Users First, Technology Second.



Technology empowers people with the tools to work more efficiently, be more productive, and do their job better.

However, as we operate in the new normal that is the digital workplace, software users are overwhelmed with countless applications with fractured interfaces and complex learning curves.

According to a recent survey of 10,000+ global employees from [Asana](#), the average employee uses 13 different applications 30 times daily.

While technology is scaling, software itself has become standardized. It's built for the masses.

Generic software experiences directly impact UX and time-to-value for users, leading to poor end-user adoption, organizations failing to find ROI in their technology investments, and high churn levels.

At Whatfix, we're on a mission to create a world where individuals are empowered to freely use and experience the benefits of the technology they utilize daily. We're doing this through a concept called **userization**.

What Is Userization?

Userization is building integrated, adaptable technology that enables software users by putting them in the driver's seat.



Userization has three main pillars:

- Userization makes it easy for users to take action, collaborate, and complete tasks faster.
- Userization is contextual. Every action is taken where the user is.
- Userization brings the technology to users and nudges them to change behavior.

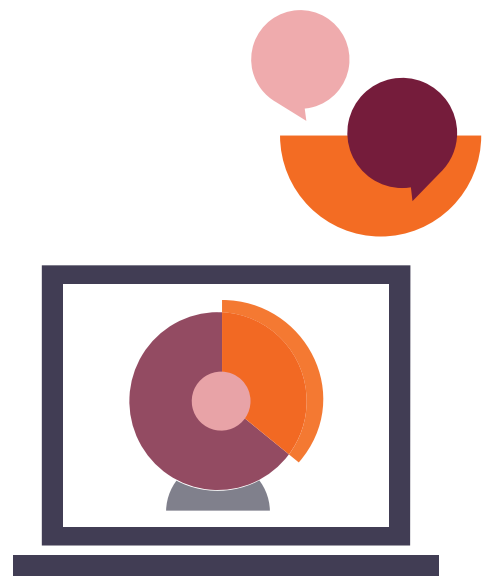
Userization unlocks a user's full potential across their entire stack of software applications

through personalized, integrated, and inclusive technology experiences. This creates a net-positive impact and experience for each software user's understanding, productivity, and success with particular users on particular technologies.

In short, userization is building an integrated, personalized experience that not only works for software users but empowers them. It allows for easier collaboration and taking action, leads to faster task completion and behavioral change, and drives efficiency and productivity.

Software products are standardized. Users are anything but. Software users frequently struggle to learn the functionalities, find support when they need and collaborate easily across different applications. This translates into increasing support costs, lower productivity, and higher time-to-value from software.

Software is powerful, but without full adoption and understanding of how to use these solutions, software users will never realize its total value and fail to reach their potential.



Userization in the Consumer-Tech Space

Over the years, consumer technology has become smarter. Today, technology understands us as individuals better and makes modifications based on our behavior. Consumer technology is moving (or has moved entirely) from standardized solutions to more personalized solutions.

Example of This From the Auto-Insurance Industry

Previously insurance products were standardized and designed based on groups of users, meaning the average driving habits of all users were used to predict the driving habits of each individual driver.

Today auto insurers use a technology called ‘telematics’ where auto-insurance customers are provided with an electronic device that plugs into the vehicle’s diagnostic port, called the OBD-II port.

From there, it monitors drivers on their driving habits, including:

- How often you drive.
- How much time you spend on the road and how many miles you drive daily.
- What times you’re typically driving (rush hour, overnight).
- How you accelerate.
- How you brake. Telematics can record incidents in which you slam the brake pedal.
- How often you’re exceeding a certain speed (usually 80 mph).

This technology helps insurance companies modify individual customer policies and decides rates based on individuals rather than regional or national averages. Insurance companies use the data to price insurance for individual drivers; drivers with high-risk behaviors will pay more for their insurance than safe drivers.



The 3 Pillars of Userization

The basis of userization is to create technology solutions and software that work for individual users. It empowers each end-user - regardless of background, experiences, technology upbringing, role, and so forth - to get the most out of the software they use daily and empower them to reach their performance potential.

The three core pillars that userization aims to achieve are:

1. Outcome and role-based technology experiences

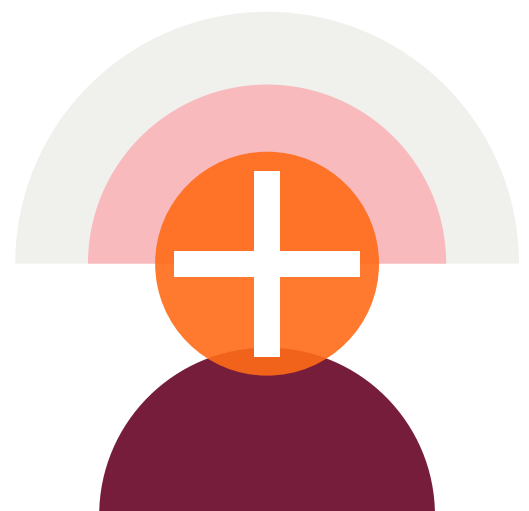
Modern SaaS tools have multiple use cases for various customer personas, industries, and use cases. For example, Whatfix can be used by:

- Product teams create in-app guidance, drive [product adoption](#), track product analytics, and collect user feedback.
- L&D teams for digital employee onboarding, training and development, performance support, and internal announcements.
- IT teams to facilitate change, onboard users to new software implementations, and drive overall [software adoption](#).
- Customer support teams to provide better customer onboarding experiences, reduce product confusion and [time-to-value](#), provide self-help support, and gather feedback.

With diverse use cases, it's critical to have contextual, role-based experiences for each user cohort. Contextual onboarding, training, support, collaboration, and other product experiences segmented by persona make it simpler to use language your audience is familiar with, highlight the most critical features and flows for each user type, and showcase a software's full potential.

User-centric experiences go beyond role-based segmentation. Software users are people, and people have different preferences and needs

With userization, software applications can create user cohorts and build contextual product experiences for each segment. This approach provides a user-centric software experience that can be scaled across a large user base, ultimately empowering every software user and driving overall [technology adoption](#).





2. Integrated technology experiences

Modern professionals are bombarded with new software tools, and the average employee uses 13 different applications daily, which are critical to their success.

Each software platform has a different interface and approach to learning, sharing, collaboration, and support. This leads to fractured software experiences with each solution needing to educate their customers on their product's jargon, interface, flows, and overall product experience.

Userization aims to bring software interfaces and experiences together into one unified experience. Connecting experiences together provides a foundation for software users to feel comfortable inside a technology solution.

It breaks down the barriers to software adoption, as users have experience with similar software experiences. It reduces overall time-to-value during the onboarding stage, as users are already familiar with its in-app guidance and onboarding flows they encounter in other digital processes and applications.

3. Inclusive technology experiences

Technology companies are often unintentionally gatekeepers of their solutions by using industry-specific jargon and creating software experiences with steep learning curves. Userizations break down technology adoption barriers by making software more inclusive of all users, regardless of technology upbringing, professional experience, role, industry, and more.

With experiences that are more approachable and human, software users can better engage and interact with the applications they use - ultimately empowering them to use software to their advantage, maximize their output, and reach their full professional potential.



The Benefits of Userization: Enterprise ROI on Technology Investments

A report from [Zylo](#) found that the average company spends \$5,800 per employee on SaaS products yearly. This equates to \$2.9M for a company of 500 people and \$29M for 5,000 employees.

And the technology cost per employee grows alongside employee count, with Fortune 500 companies spending upwards of \$17,000 per employee on technology annually.

By creating user-centric software experiences, companies are enabled to find real ROI in their technology investments. The benefits initially promised by SaaS vendors during demos and the sales cycle can be easily accomplished.

This means userization presents critical benefits for both **companies** that are investing in new software, as well as the **software vendors** themselves.

- **Companies want to maximize ROI from their software investments.**
- **SaaS companies and technology providers want to provide real value to their customers, ultimately creating loyal customers and product evangelists.**

Let's explore a few immediate benefits of userization:

1. Increased end-user productivity

By infusing userization into your software deployments and interfaces, you're empowering users through contextual nudges that enable them to find real value in each application. These in-app user experiences provide relevant knowledge and gentle performance support that makes processes faster and enables software users to reach their goals faster.

2. More efficient and proficient software users

With userization, organizations can enable software users with the tools they need to become expert, proficient users. When users can find value and adopt advanced product features, organizations find more ways to take advantage of their software applications, and SaaS providers can create loyal customers who understand a product's complete value.

3. Reduction in IT and support costs

By enabling users with outcome-based experiences and contextual nudges centered around them, organizations and SaaS companies can reduce the amount of IT and customer support-related tickets and queries. This leads to cost savings measures for both companies and SaaS vendors, reducing user errors, IT support questions, and customer support tickets - ultimately cutting IT-related and customer support costs.

4. Reduced user churn and more product evangelists

With userization, companies can reduce user churn by understanding the needs of their customers and creating experiences tailored to those needs. This helps reduce the time-to-value for users, which ultimately reduces churn. The more educated customers are on your platform, the more invested they become reliant on your platform(s), which become critical to success, day in and day out.

This ultimately leads to more sticky products, helping to power product-led growth strategies that turn users into upselling opportunities and loyal product evangelists.

5. Mitigated risk and better data integrity

Data validation, intelligent recommendations, and contextual nudges improve the completeness and accuracy of data across your enterprise systems. This means cleaner, more complete data sets for your customers, employee, and users, leading to better compliance and minimizing the risk of inaccurate data that often results in forecasting and reporting errors.

Userize Your Software With Whatfix

Now that we understand userization and how it aims to create better and more consistent, inclusive, user-centric technology experiences, let's look at how platforms like Whatfix empower organizations to create a scalable userization strategy that is approachable and welcoming for all software users.

1. Reinforcing user behavior with contextual nudges

With Whatfix's smart behavior-guiding technology, software becomes user-centric, with users nudged to take the most contextual and helpful route through an application that guides user behavior toward the desired outcome. Examples could be driving product-led growth, changing a business process, or launching a new feature.

These contextual, just-in-time nudges are low effort, engaging, and provide immediate support to software users that help them make decisions and self-reinforce behavior. A user has a goal, and the software should be there to empower that user to achieve their goal(s).

This leads to a reduced time-to-value by assisting users to their "aha!" moment and provides software users with experiences that make sense to them and their needs



2. More efficient and proficient software users

Total experience (TX) is a recent term coined by [Gartner](#). A single technology layer across more applications and mediums (web, mobile, desktop) for employees, partners, customers, and users translates into symbiotic benefits that include implementation repeatability, brand consistency, and intuitive user experiences.

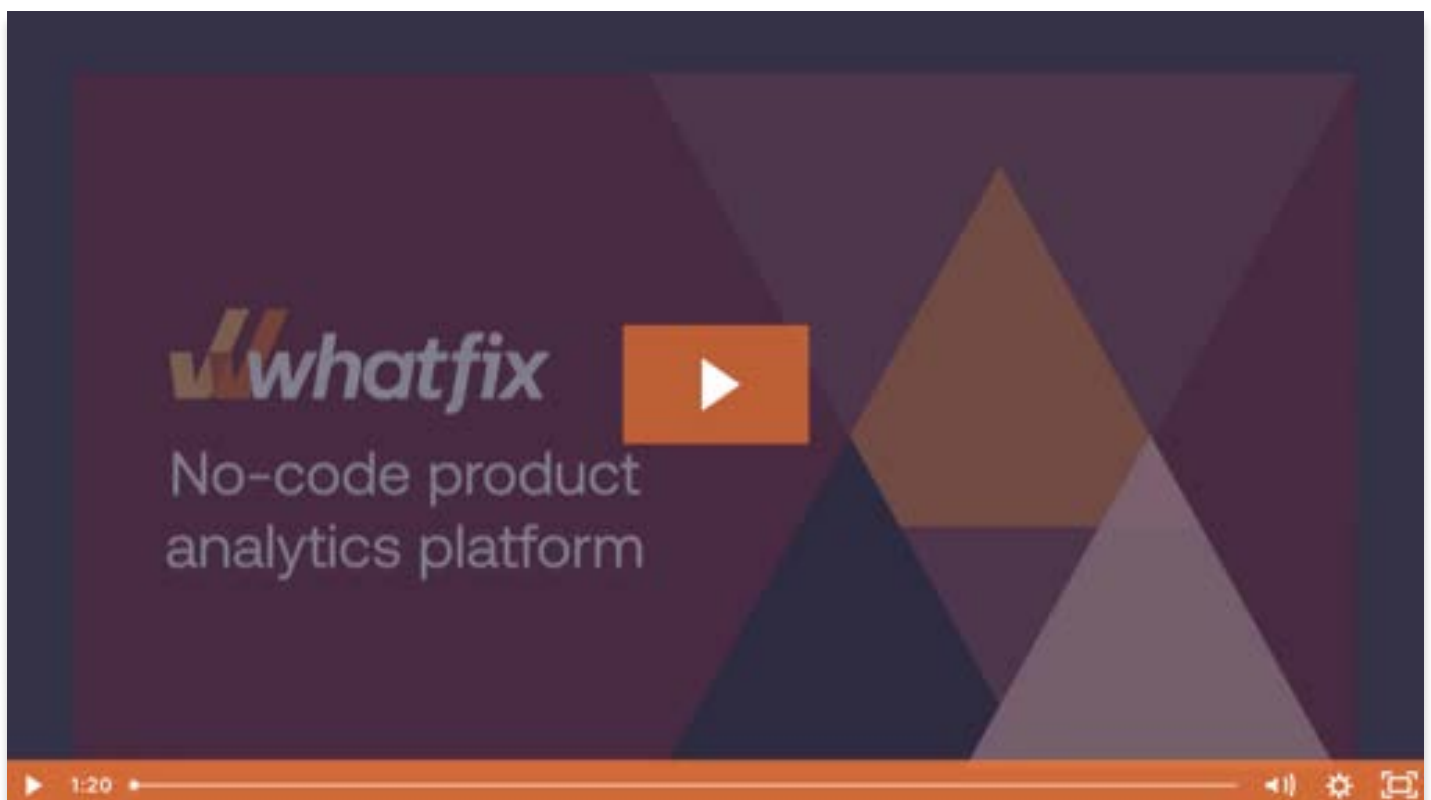
Consistent experiences provide a foundation for software users and reduce resistance to change and fear of new products. It leads to higher software adoption, reduced churn, and more satisfied, expert software users.

Userization brings a consistent user experience, irrespective of where they're using software. In the modern, digital workplace, users must be tasked with processes that span multiple application interfaces and screen types and collaborate with other users. By bringing these fracture experiences into one, consistent software experience, users are enabled to become more productive and proficient users.

With Whatfix's content crawling capabilities, you can leverage all your existing help content in your knowledge repositories and make it accessible to users within the application they're current on. Deep-search capabilities makes content discovery faster by surfacing relevant content based on keywords used.

Whatfix's robust element detection algorithms automatically detect application elements and adjust to changes. This no-code, automatic element detection powers:

- **Product analytics, by accurately capturing user events**
- **Easy and simple content creation, by clear identification of application elements, and**
- **Minimizes manual effort in content maintenance, by accommodating changes to application elements and preventing breakage of content**



3. Product analytics

At Whatfix, our technology is packaged in a framework known as “**Analyze. Build. Deliver**”. The engine of this concept is ‘Analyze’, powered by no-code embedded product analytics that empowers organizations to capture user actions and events to identify key behaviors and insights within your applications (both employee and customer-facing).

This includes:

- How many users are using a software - ie. what is my overall level of product adoption.
- What features are (and aren’t) being adopted.
- How end-users consume help content and gaps in your help and support documentation.
- Identifying friction and pain points in your user flows.
- Creating contextual software user experiences through cohort segmentation based on demographics or behavior.

With these insights, organizations can create contextual software experiences tailored to cohorts of users. For example, with Whatfix’s smart behavior-guiding technology, software users are nudged to take the most contextual and helpful route through an application that guides user behavior toward the desired outcome. Examples could be driving product-led growth, changing a business process, or launching a new feature.

These contextual, just-in-time nudges are low effort, engaging, and provide immediate support to software users that help them make decisions and self-reinforce behavior. Ultimately this leads to a reduced time-to-value by assisting users to their “aha!” moment and provides software users with experiences that make sense to them and their needs.

Whatfix Analytics powers the entire digital adoption flywheel, providing organizations with the insights to inject a data-driven strategy into their digital adoption and transformation strategies.



Case Study: A leading information services company userized their basic CRM processes to generate significant revenue and ROI, powered by Whatfix

Our customer is a leading global information services provider, and a Fortune 100 company. The company improved pipeline data hygiene on its Salesforce CRM instance to bring down overdue deal value from \$111M to \$53M in 4 weeks by creating more user-centric process flows with Whatfix.

They had made a significant investment in Salesforce, and customized it heavily to cater to its specific needs. In a short amount of time after implementation, overdue opportunities accumulated to a value worth \$111M, as a result of sellers entering dirty, incorrect, and incomplete data into Salesforce. When sellers lost track of their deals, they often closed them and marked them as 'lost' or 'dropped'.

The quality of their CRM data was extremely poor, which led to issues across compliance, reporting, and forecasting.

With Whatfix, personalized pop-up notifications were implemented to remind sellers of overdue opportunities. A custom flow was created that led them straight to a curated list of their respective overdue opportunities.

This drove behavior change, which as a result directly translated to actual ROI. Overdue deal value decreased from \$111M to \$53M in only 4 weeks. To put this into context, if we assume 10% of deals "lost" or "dropped" are recovered, and assume a 20% close rate, this in itself would drive an additional revenue of \$1.2M.

It's a classic example of how userization of the most basic processes, such as updating opportunity data on an enterprise CRM, generates significant value for large organizations.

Challenge

- Overdue opportunities worth \$111m
- Sellers lost track of overdue deals
- Opportunities dropped or got lost
- Poor compliance, data quality, & reporting

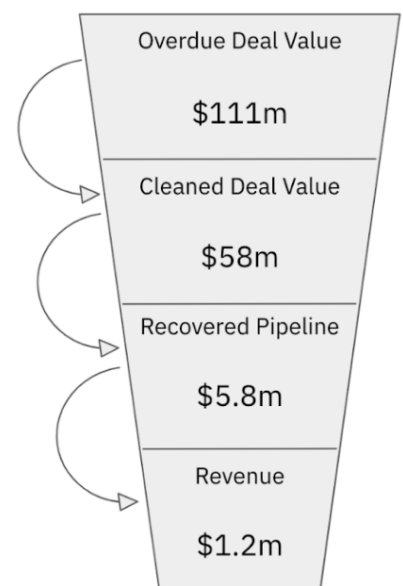
Whatfix Solution

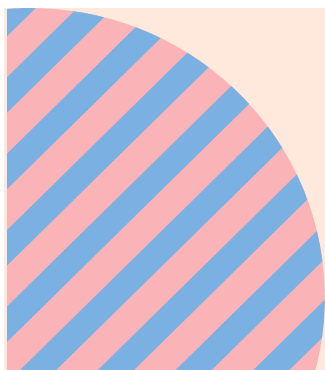
- Personalised pop ups to remind sellers with overdue opportunities
- Pop ups to alert sellers of deals which are about to close in the next 3 days
- Walkthroughs to lead them to a custom list of all their overdue opportunities
- Smart tips & nudges to make them save the list under favorites for easy reference

Overdue deal value decreased from \$111m to \$53m in 4 weeks
 ⇒ **Improved compliance, pipe data quality & reporting**

Assuming 10% recovery of deals which would be lost or dropped
 ⇒ **\$5.8m additional pipeline**

Assuming a win rate of 20%
 ⇒ **\$1.2m additional revenue**





Ready to learn how to userize your product with Whatfix?

Currently, people need better skills to utilize software applications better. It's time for applications to understand people better.

See how brands create better, more user-centric product experiences by investing in userization with Whatfix's digital adoption platform and product analytics software.

[See Whatfix in action now.](#)



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